



To: Janelle Sands, REL COR  
From: Nicole Patton Terry, REL Southeast Director  
Date: 6/30/2023  
Re: Subject Matter Expert Feedback Memo for REL Southeast proposal 5.4. 1.1 Professional Learning Community: Grades 4-12 Content Area Literacy

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The Subject Matter Expert (SME) reviewed REL Southeast's draft proposal 5.4.1.1 in June 2023 and did not have any substantive changes to the proposal. The SME believes that the proposal meets all of the NCEE guidance for proposals generally, and tools specifically. Please see the rubric on the following pages which contains the feedback the SME provided to REL Southeast.

## Rubric for Reviews of REL Southeast Studies and Tools

**Instructions:** This rubric should be used to review the quality of the first drafts of each proposal and report for Task 5 studies and tools. This review rubric is based on the criteria established in *NCEE Guidance for REL Study Proposals, Reports, and Other Products* (Summer 2022) and the Promising Practices Checklist (November 2022).

The rubric should be completed to indicate which applicable review criteria (each row in the review rubric) are met and which are not met. The reviewer should note any related comments they have made in the annotated version of the product by writing in the comment box numbers in the “Comment Number(s)” column. Once the review is complete, fill out this review summary page by noting which criteria were not met in each section in the table below.

<b>Deliverable Number:</b>	5.4.1.1
<b>Title:</b>	Professional Learning Community: Grades 4-12 Content Area Literacy
<b>Date Reviewed:</b>	June 20, 2023
<b>Name of Reviewer:</b>	Joseph Dimino

Section*	Unmet Criteria #s
I. All Products: Relevance	
II. All Products: Writing Quality	
IV. Tools: Guidance for Ensuring Technical Quality and Utility	
VII. All Proposals	

\*All criteria were met.

Question	Approach to addressing the question	Criteria Met (Y/N)?	Comments
<b>I. All REL Products: Guidance for Ensuring Relevance</b> Proposals for and drafts of all REL products should meet the criteria in this section to demonstrate the products' relevance to addressing important needs.			
<b>1. Do the proposal and product identify a specific regional need that the product is intended to address? Does addressing this need have the potential to benefit students?</b>	<p>Proposals and products should clearly state a need of a regional stakeholder that the product is supposed to address. The authors should provide sufficient contextual information to make the case that the need is important to the region. When describing this context, the authors should support any factual claims with empirical evidence. They should also identify the regional stakeholders—usually those participating in a REL partnership—that articulated this need. Products should briefly describe the composition and goals of the stakeholders or partnership to provide a broader audience with the context for why the REL did the study. The need that authors identify should go beyond stakeholders' general concern about a problem or general interest in more information on a topic. Rather, the need should include a specific, future action or decision that the product could inform. The action or decision that the product is meant to inform should have the potential to benefit students. Products may inform decisions focused on intermediate outcomes—such as retention of highly effective teachers—as long as students can ultimately benefit.</p>	Yes	<p>The authors indicate the need for this product by presenting data (NAEP) and the need expressed by the stakeholders in REL-SE regions (FL, GA, and MS). What is most critical is the need for content area teachers to learn how to integrate effective, research based, literacy instruction into their content area classes. For the most part, content area teachers are dedicated and excited about teaching their subject area.</p> <p>However, most teacher training institutions offer one course in pedagogy, usually entitled, Reading in the Content Areas. Clearly, the intent is admirable, but the effect is, typically, minimal.</p> <p>Regarding the benefits to students: Fortunately, there is a considerable amount of excellent research indicating the benefits of the effective instructional techniques discussed in this proposal. A vast majority of these studies have been vetted by the WWC and have either met standards without reservation or met standards with reservations. Furthermore, the studies used in developing the practice</p>

			guides go through rigorous, high-level scrutiny before the instructional strategies can be incorporated into the guide.
<b>2. Does existing literature on the issue support the need for the product?</b>	<p>In most cases, proposals and products should present a summary of the existing literature as part of the justification for undertaking the study. The literature review should briefly but accurately discuss existing evidence about the product's specific research questions or objectives—not just about a general problem or issue that motivated those questions. For example, if a study is examining high school characteristics that are related to students' postsecondary success, the literature review should not only discuss existing concerns about postsecondary success but should also identify which school characteristics have and have not already been found by prior research to predict postsecondary success. The literature review should allow the audience to see how the proposed product fills a specific gap in the existing body of knowledge, tools, or methods on the particular topic. Literature reviews should provide a close, critical assessment of the existing evidence. Authors should not only summarize findings but also note key limitations when the basis for those findings is weak. They should place more weight on peer-reviewed research (including journal articles and government reports that have gone through peer review) and cite original sources rather than other writers' summaries. Literature reviews should also acknowledge, rather than ignore, any inconsistent or contrary findings in past research.</p> <p>For additional details on criteria relevant to literature reviews and systematic evidence reviews, please see Section VI.</p>	Yes	<p>The studies cited in the proposal were conducted to meet a specific goal: To improve 4-12 students' comprehension of content area texts. Most of these studies have been conducted by leaders in the field including, but not limited to, The Meadows Center for Preventing Educational Risk at the University of Texas, Austin and the Florida Center for Reading Research at Florida State University.</p> <p>The proposal writers have given a very clear, honest description of the studies which include promising results, as well as, limitations.</p>
<b>3. Does the product directly address the</b>	After identifying the actions or decisions that a product is meant to inform (see criterion 1), authors should explain how stakeholders can use the information in	Yes	This product specifically addresses every need that has been identified in the High Leverage Need or

<b>need that the authors have identified?</b>	<p>the product when undertaking those actions or making those decisions. In particular, proposals and products should state the research questions or objectives such that the answers can directly inform the actions or decisions. Implications sections of reports should discuss the specific ways in which stakeholders could use the study findings. Likewise, the text that accompanies tools should explain how to use the outputs of the tool (for example, the results of a new school climate survey) to make better actions or decisions (for example, to identify expectations for student behavior that staff need to communicate more clearly).</p>		<b>Problem and the Evidence</b> <p>Base portions of the proposal. The authors addressed these needs and crafted a series of PLC sessions.</p>
<b>4. Does the product have a well-defined audience that ideally reaches beyond a single region?</b>	<p>Authors should identify the most important audiences to which the proposed product will be targeted. Although the product will arise out of responding to a regional need, the target audiences should generally not be limited to only stakeholders in the region. Instead, authors should try to describe why the information ought to be important and useful to a more national audience. To engage such an audience, the product should describe the possible uses of the information in circumstances likely to be found in many regions.</p>	Yes	<p>States in all regions of the United States are in dire need of this product. According to The Nation's Report Card, scores declined in NAEP reading at grades 4 and 8 compared to 2019. Specifically, scores have declined in 30 states, and there was no significant change in any of the remaining states. Sadly, not one state reported an increase in NAEP scores.</p>
<b>II. All REL Products: Guidance for Ensuring Writing Quality</b> <p>REL products should meet the criteria in this section to communicate information clearly and effectively. These criteria pertain mostly to reports and tools rather than proposals.</p>			
<b>5. Do the proposal and product have a precisely defined focus?</b>	<p>Each product that the authors propose should focus on a single question or objective (or a closely related set of questions or objectives). When authors choose to pursue a line of investigation that covers a range of research questions or objectives, they should consider proposing multiple products to address them. Products with a narrow focus are generally easier to read than a large, comprehensive product that covers a broad range of topics.</p>	Yes	<p>Each PLC session has a specific focus. The authors have culled research-based practices recommended in four IES practice guides. For an instructional practice to be included in a practice guide, the research upon which the practice is based must pass rigorous standards. All sessions are geared to achieve the goal of improving content area literacy.</p>

<p><b>6. Do the proposal and product motivate all research questions or objectives and make them easy to understand?</b></p>	<p>The proposal and product should lead the audience to care about the research questions or objectives. As discussed in criterion 3, authors should phrase research questions such that the answers will represent actionable information. In addition, the proposal and early sections of the product should explain the importance of each research question or objective to ensure that the audience will be motivated to read the remainder of the product. Authors should compose the research questions or objectives such that readers can quickly read and understand them. In particular, the research questions or objectives should be fairly compact. Details related to specific variables, target populations, and timeframes should be spelled out clearly in the narrative that accompanies the research questions or objectives.</p>	<p>Yes</p>	<p>The authors consistently refer to the research and provide participants with demonstrations of the research-based instructional practices. The instructional design of the PLC is such that participants have an opportunity to practice during the session and are asked to implement the practice with their students before the next PLC session. Since the beginning of each session begins with a debrief of their classroom implementation, participants are held accountable and will begin to make these practices a regular part of their content area instruction. Also, PLCs give participants the opportunity to learn from each other. Throughout the PLC, participants can share both what worked for them and what didn't. Oftentimes, the facilitator and/or a follow participant offer an idea of what might work, based on a similar experience.</p>
<p><b>10. Are figures and tables clear and self-explanatory?</b></p>	<p>The audience should be able to understand and interpret every figure and table without having to read the text. For figures and tables to be able to stand alone:</p> <ul style="list-style-type: none"> <li>• Titles of figures should convey key messages or findings. For example, a figure title could say, "District A students scored highest on reading comprehension," rather than "Comparison of reading comprehension scores across districts."</li> </ul>	<p>Yes</p>	<p>The tables are clear and easy to read and interpret. These include the following:</p> <ul style="list-style-type: none"> <li>• PLC sessions and Learning Outcomes (Table 1)</li> <li>• PLC Components and Resources (Table 2)</li> <li>• Project timeline</li> <li>• Costs</li> </ul>

	<ul style="list-style-type: none"> <li>Authors should clearly label all elements (such as axes, categories, data series, symbols, and column and row headers).</li> <li>Notes to the tables and figures should include information that is essential for the reader to understand the sample and data.</li> </ul> <p>In addition, for figures to be as clear as possible:</p> <ul style="list-style-type: none"> <li>Figures should show the most important data needed for readers to grasp the key findings, rather than provide an exhaustive display of all data.</li> <li>To allow readers to make precise comparisons, figures should generally direct readers to compare lengths on a common scale (such as the height of bars on a bar chart). Readers are less able to make precise comparisons of areas (for example, portions of pie charts or nonadjacent bars in stacked bar charts). Visual forms that use shading (for example, heat maps) are best for making generic, instead of precise, judgments.</li> <li>Figures should be sorted on the most important variable. For example, sorting categories by their outcome (such as most to least) can help readers easily order categories and might be preferable to sorting categories alphabetically.</li> </ul> <p>Proposals should include examples of figures (with hypothetical data) resembling figures that are likely to be appear in the final product.</p>		
<b>11. Are different parts of the product consistent and aligned with each other?</b>	<p>Products are easier to read when sections of the product are well aligned. Authors should:</p> <ul style="list-style-type: none"> <li>Discuss topics in the same order across sections.</li> <li>Make explicit connections across sections. For example, the text can map each key finding in the findings section to a research question from the introduction. Likewise, a finding</li> </ul>	Yes	<p>This PLC is very well organized as a consistent procedure is implemented for each section. Furthermore, participants are given an assignment to be completed before the next session. For example, at the end of Session 3,</p>

	<p>that addresses a main research question should generally be bolded as a key finding so that the audience can easily connect research questions with findings.</p> <p>Likewise, products are easier to read when they refer to key findings, terms, and data points in a consistent manner and use consistent criteria for calling out a finding. Authors should:</p> <ul style="list-style-type: none"> <li>• Phrase main findings similarly in the summaries of the product and in the detailed content within the body of the product.</li> <li>• Define key terms early in the product and use them consistently throughout. Do not introduce multiple terms for the same concept such as “teacher effectiveness,” “teaching quality,” and “teacher performance.”</li> <li>• Ensure that numbers mentioned in the text appear in some table or figure (unless they are minor points, in which case the authors should make it clear that those points are not shown in any table or figure).</li> <li>• Provide transparent criteria for classifying differences between groups as large, small, or absent and use those criteria consistently throughout the product (see Appendix A for details).</li> </ul>		<p>participants are given the following assignment:</p> <ul style="list-style-type: none"> <li>• Read sections of the practice guides.</li> <li>• Implement one of the strategies in their classrooms that was presented in Session 3.</li> <li>• Write a brief reflection on the implementation of the strategy.</li> <li>• Be ready to debrief at the beginning of Session 4.</li> </ul> <p>Also, participants are provided with a cumulative review to ensure that they become embedded into their instruction. Consistency is paramount, which is evidenced by the format of each session.</p>
<b>12. Are the citations fully referenced?</b>	<p>Citations should follow APA format and must provide adequate information to ensure accessibility to readers and reviewers. (Please see the REL Program <i>Writers Guide and Style Guide</i> for further information on citations.)</p>	Yes	All citations meet APA requirements.
<b>IV. Tools: Guidance for Ensuring Technical quality and Utility</b>			
	<p>Tools produced by the RELs are intended to make it easier for users to create, access, interpret, or apply research evidence.</p>		
<b>13. Does the tool have a clearly defined objective?</b>	<p>Proposals for and drafts of tools should describe the task that the tool is supposed to help users accomplish. For example:</p> <ul style="list-style-type: none"> <li>• If the authors are developing a survey, they should precisely define the</li> </ul>	Yes	<p>The overall objective is clear. In addition, each session has clearly defined objectives which are addressed in Table 1. Specifically, this table</p>

	<p>constructs that the survey is intended to measure.</p> <ul style="list-style-type: none"> <li>• If the authors are developing a rubric, they should precisely define the dimensions of quality that the rubric is intended to measure. For instance, a rubric for districts and schools to rate the quality of instructional materials might measure how well the materials promote students' higher-order thinking or connect the content to students' prior knowledge.</li> <li>• If the authors are developing workshop resources, they should define the concepts and skills that participants should acquire by the end of the workshop.</li> <li>• If the authors are developing resources to help users implement a procedure, they should specify the objective of the procedure. For instance, guides and spreadsheet templates to help teachers evaluate the effects of instructional changes might be aimed at reaching a decision on continuing, revising, or discontinuing a new instructional approach.</li> </ul>		<p>addresses the content of each PLC Session and the participants' learning outcomes.</p>
<p><b>14. Does the tool reference and draw on evidence?</b></p>	<p>Proposals for tools should present the research that directly informs the content of the tool. For example:</p> <p>Proposals to measure particular constructs through a survey or rubric should use existing research to justify why those constructs are important to measure. Ideally, the proposals should also identify existing instruments with evidence of reliability and validity that can serve as a reference for selecting or developing items.</p> <p>Proposals for workshop resources should describe plans for ensuring that the content of the workshop reflects evidence-based practices.</p> <p>Proposals for resources to help users implement a procedure should identify the key research that the authors will consult</p>	<p>Yes</p>	<p>The foundation for this tool is the information contained in four IES practice guides. As mentioned above, the PLC will implement research-based practices recommended in four IES practice guides. For an instructional practice to be included in a practice guide, the research upon which the practice is based must pass rigorous standards established by the What Works Clearinghouse. Furthermore, before a person is allowed to review studies, they are required to participate in rigorous</p>

	<p>when articulating the recommended steps in the procedure.</p> <p>Proposals should also note whether other similar tools have been previously developed, and discuss the extent to which the proposed tool will draw upon and make contributions beyond the previous tools.</p> <p>The draft of a tool should briefly cite the research that informed its development. More detailed explanations of the research that supports a tool may be included in the tool's supplemental material or appendices.</p>		<p>training and pass a challenging test.</p>
<p><b>15. Does the tool clearly identify the target users and specify the background knowledge and training that they need?</b></p>	<p>Proposals for and drafts of tools should identify the target users and their roles. Multiple types of individuals may interact with tools—such as those who facilitate versus attend a workshop—and authors should clarify the roles of these multiple potential users. The authors should also describe the background knowledge or training that the users need to acquire beforehand so that the tool aligns with the users' skills and capacity. For example:</p> <ul style="list-style-type: none"> <li>Surveys should specify the types of individuals who should administer and respond to the survey and whether the survey items make any assumptions about the survey administrators' or respondents' familiarity with the topics.</li> <li>Rubrics should describe procedures for selecting and training raters.</li> <li>Resources to help conduct a workshop or implement a procedure should identify each key role (such as facilitator, attendee, or notetaker) and the knowledge and training that individuals will need to carry out the role.</li> </ul> <p>Whenever the use of a tool requires training that users may not have acquired previously, the tool should point users to training resources that they could easily</p>	<p>Yes</p>	<p>The authors clearly state that this PLC is geared to content area teachers, grades 4-12 teachers. The PLC specifically addresses the background knowledge (i.e., the research based) and the training they need to implement these instructional practices. The instructional design of this PLC is in concert with the previously PLC guides published by IES.</p>

	access or should include training materials directly.		
<b>16. Does the process for developing the tool include opportunities for input from potential users?</b>	Obtaining input from potential users can enhance the degree to which the tool is clear and useful to them. Whenever possible, proposals should identify ways of obtaining such input during the development of the tool. Examples of obtaining input include pretesting items from surveys and rubrics (on nine or fewer respondents when authors have no plans to secure OMB approval) or providing an early draft of a resource to a small sample of potential users for feedback.	Yes	This PLC guide is based on the PD developed for four REL-SE states (FL, GA, MS, and SC). The purpose of this guide is to build capacity. That is, educators across the country can use it to provide PD to their colleagues. The authors have developed an iterative design to test the usability of this tool including a usability study that will be conducted in Leon County, Florida. Data will be collected in the form of surveys, focus groups. These data will be used to triangulate findings. Based on these findings, the author will revise the PLC guide.
<b>17. Does the tool provide a realistic estimate for the amount of time that users will need to use the tool?</b>	Proposals for and drafts of tools should provide an estimate for the amount of time users should expect to spend on the entire tool and on each key step or activity. For example, authors should estimate the amount of time needed to complete a survey or rubric, conduct each segment of a workshop, or implement each step of a procedure. The estimated amount of time should be adequate to achieve the objective of each step or activity. Proposals should provide enough detail about the objectives of each step or activity (for example, a detailed agenda for a workshop) to demonstrate that the allotted amount of time is sufficient to achieve those objectives. Authors should refine their time estimates during the development of the product—for example, by pretesting the tool on likely users. Estimates should also take into account key factors such as (1) participants' background and familiarity with the content, as less advanced users	Yes	Taking into consideration the demands placed on teachers, the PLC is designed to be effective and efficient. The sessions are very well described, which provides evidence for the best use of participants' time. Each session will contain all materials the facilitator will need to conduct the sessions (e.g., PowerPoints, notes for the presenter, activities, etc.) When these materials are at the ready, the facilitator can conduct the session in a reasonable amount of time. The authors, having been teachers, understand the importance of this time element.

	may require more time; (2) the time needed to acquire training for using the tool; and (3) for workshop resources, the size of the participating group, as larger groups may need more time for sharing or reflection activities.		
<b>VII. Reminders about Additional Content that Proposals Should Cover</b>			
	In addition to meeting the criteria described in earlier sections for relevance, writing quality, technical quality, and utility, proposals should also cover the additional topics described in this section to assure IES that the authors can develop and complete the proposed products successfully		
<b>18. Does the proposal include a timeline for the project or otherwise explain when all key activities will take place? Does the schedule appear feasible, in line with the scope and resources of the planned study?</b>	Study proposals should include sufficient information that gives IES the assurance that the study is within scope and likely to be completed appropriately and on time. The schedule should include time for NCEE review, OMB clearance where necessary, and account for real-world constraints such as school schedules and alliance partners' other time commitments.	Yes	A detailed timeline is included in the proposal.
<b>19. Does the proposal adequately identify and describe major challenges that could arise in conducting the study, and how the researchers would address them?</b>	Plans should provide key information that gives IES the assurance that the study leaders have considered possible challenges that may arise during data collection, analysis, and reporting. Such challenges often include accessing necessary data, recruitment of appropriate respondents or sites, and maintaining alliance interest over the course of the project. Proposals must describe strategies to address these challenges.	NA	
<b>20. Is there any indication that the data collection will require OMB clearance? If</b>	IES has primary responsibility for ensuring that OMB guidelines are observed, but the proposal should identify any instances that may require OMB clearance. Specifically, the authors should:	NA	

<b>so, does the proposal explain how the study team will limit data collection burden on respondents and schools and justify any planned use?</b>	Identify any plans for similar data to be collected from more than nine respondents. Describe efforts to limit data collection burden. Provide information about incentives and how the plan for incentives aligns with NCEE guidelines that require incentives to be modest and justified (for example, small incentives may be needed in order to secure adequate response rates).		
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## Contract Review Sheet

**Contract Specialist:** Ms. Jana Knapp      **Contracting Officer:** Mr. Joseph Gibbs  
**CAM Group:** PCG    **Tracking #:** N/A    **Solicitation #:**  
**Contract #:** 91990022C0014

**For awards only –**

**Amount Approved on Acquisition Plan** (including addenda, if any):

**IGCE Amount** (Base and All Options): \$

**Negotiated Amount of Base and Exercised Options:** \$0.00

**Negotiated Amount of Base and All Options:** \$N/A

**For modifications only –**

**Amount Approved on Acquisition Plan** (including addenda, if any): \$803,000.00

**IGCE Amount:** N/A

**Negotiated Amount:** \$

**Date of Last Contract Monitoring Plan Review:**

**Commercial Item:**  yes  no

**Multi-Year Approval:**  yes  no

**High-Risk Approval:**  yes  no

**Type of Action (check one):**

Solicitation     Award     Modification     Closeout

**Review Request** (Insert basic information on type of action for review, for example, “Full and open solicitation for IT support services anticipating an IDIQ contract with FP task orders”):

Contract requirement for the REL Southeast.

See the documents for the subject Modification.

**Document location** (Insert complete path to document location):

\\bpvhxwvarc001\OFO\PREVIOUS OCFO\OCFO\CAM\All Contracts\FY21\RELS Recompete FY22-FY27\5. Post Award\2. Modifications\West\P00004 Revised Deliverables

**Level(s) of review required** (check all that apply):

- CO (every action)
- Group Manager (all solicitations, options, and awards. Any other actions as required by manager.)
- CRB – electronically (all actions exceeding \$2,500,000.00, excluding incremental funding and options)
- CRB – in person (at CRB’s discretion)

*Please document all comments and their resolution on this form. It is not sufficient for the CS to respond “done;” you must say how you addressed the issue raised. Group Manager and CRB comments shall be identified as High Priority (H), Medium Priority (M), or Low Priority (L). CRB comments will be consolidated from all reviewers. In-person CRB review may be convened if any High Priority comments are made, or if a combination of Medium and/or Low Priority comments makes in-person review appropriate, or at CRB’s discretion.*

## **CONTRACTING OFFICER REVIEW**

**Contracting Officer Name:** Mr. Joseph Gibbs

## Contract Review Sheet

L/M/H	Contracting Officer Comment	Contract Specialist Response / Resolution
M	SF30 – for clause H.2 3452.237-70 SERVICES OF CONSULTANTS (MAY 2011) – Is there a fill-in because it has \$800 in the verbiage, but under our purpose it shows the daily rate is revised to \$1100.	This does not have a fill-in you can change. That is why the language is written as such in the purpose.
M	Can we Rotate the Deliverable schedule and save before attaching so it can flow with the rest of the document?	The Deliverables has been rotated.
M	SF30 -Pages 45 thru 78 are blank.	This has been corrected.
M	SF30 – in you Purpose you state “Revised deliverable schedule (to be included as part of the response for modification)” – you can delete the part in parenthesis because this is the modification.	This has been corrected.
M	MTF – please see email to update the Header	The header has been updated.
M	MTF – Please make sure that the header for each paragraph is on the same page as the start of the information that follows it. i.e. “DESCRIPTION OF MODIFICATION” is on the first page but all the information for that starts on the next page. Just push that over onto page 2.	This has been pushed over to page two.
	Great job on the write up.	Thank you.

OS Approval obtained (*CO personally checked for approval on workload report or approved acquisition plan*)  
 CFO Approval obtained (*CO personally checked for approval on workload report or approved acquisition plan*)  
 Approval not required – provide reason

**CO Signoff:** JIG 07/19/2023

## GROUP MANAGER REVIEW

**Group Manager Name:** Ms. Genesis Griffin

L/M/H	CO Comment	Contract Specialist Response / Resolution

OS Approval obtained (*CO personally checked for approval on workload report or approved acquisition plan*)  
 CFO Approval obtained (*GM personally checked for approval on workload report or approved acquisition plan*)  
 Approval not required – Not required at the solicitation stage

**CO Signoff:**

## CRB REVIEW

**CRB Reviewer Name(s):** PLG

L/M/H	CRB Comment	Contract Specialist Response / Resolution

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\*\*if additional verbiage or questionnaire is needed, please send an email request.

OS Approval obtained (*CRB personally checked for approval on workload report or approved acquisition plan*)  
 CFO Approval obtained (*CRB personally checked for approval on workload report or approved acquisition plan*)

**CRB's disposition:**

- Recommended with no comments
- Recommended with comments (see comments above)
- Returned for correction and resubmission
- Required to undergo in-person review (see above).

## **CRB IN-PERSON REVIEW**

Names of attendees:

Summary of discussion/questions:

Resolution of discussion/questions:

## REL Southeast Supplemental Funding Proposal

### Summary

The REL Southeast team is proposing to add a new project to develop a tool that will support tier 1 content area teachers in grades 4-12 in incorporating literacy into their instruction. The proposed budget for this tool is \$812,691.

### Project Description

The REL Southeast staff have conducted training across multiple states in the region designed to build the knowledge and abilities of content area teachers to integrate evidence-based literacy practices into their courses. Trainings have been offered in Florida, Georgia, and Mississippi. In response, the members of Mississippi Adolescent Literacy Partnership requested a companion tool in the form of a professional learning community (PLC). They believe a PLC could be an important resource for content area teachers involved in the Adolescent Content Area Literacy Project that has been implemented in Canton Public School District, Columbus Municipal School District, and Laurel School District in the state. And given prior interest in other states, the REL Southeast team believes this tool will be of broad interest in the region and nationally.

This tool will be unique in that it is designed to support tier 1 content area teachers in grades 4-12 in incorporating literacy into their instruction. While partners in the Southeast region feel as though they are making good progress teaching literacy in the primary grades, they have often noted the need to ensure upper grade students continue to grow in their skills. Therefore, teachers need to know how to integrate work in literacy without sacrificing time devoted to content area instruction. This tool will help them meet that challenge. In addition, because the sequence of instruction is unique, and the PLC will be designed to help tier 1 content area teachers integrate literacy practices into their courses, there may be an opportunity to expand the evidence base through a causal study of its use in the future.

### Budget

The proposed budget for this project is **\$812,691**. The attached proposal has detailed budget tables for each year. Although the budget exceeds the amount of the supplemental funding, the REL Southeast can accommodate that difference within existing funding.

### Expected Burden

The addition of this project to the REL Southeast workplan will not negatively impact any other tasks or activities. There will be additional effort under Task 1 associated with submitting and tracking deliverables and under Task 3 as part of partnership maintenance. However, these burdens will be relatively small and can be accommodated under existing staffing and effort levels. The REL Southeast will not need to adjust the scope of any other projects because of initiating this one.



UNITED STATES DEPARTMENT OF EDUCATION  
 OFFICE OF FINANCE AND OPERATIONS  
 OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

***Determination and Findings to Revise Deliverables 91990022C0014 - REL Southeast P00005***

Contract Number:	91990022C0014 - REL Southeast
Period of Performance:	January 24, 2022, through January 2, 2027
Acquisition Plan Tracking Number:	662
Purchase Request Number:	N/A
Purchase Amount:	\$5,963,713.98
NAICS Code:	611710: Educational Support Services
UEI	JF2BLNN4PJC3
Product and Service Code (PSC):	R499: Support Professional: Other
Service Contract Coding Declaration:	Other Function

**AUTHORITY**

Modification P00004 is executed in accordance with the following contract clauses:  
 Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

**BACKGROUND**

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

## **PURPOSE/ DESCRIPTION OF CHANGES**

The purpose of Modification P00005 for contract 91990022C0014 REL Southeast is the following:

- Provide funds in the amount of \$5,963,713.98 for Year 3 of the contract.
- Incorporate a revised deliverable schedule.
- Revise the Alternate Contracting Officer (ACOR) from Chris Boccanfuso to Nicassia Belton.

## **FUNDING**

- The total contract value remains the same at \$27,803,000.00.
- The total contract funding value is increased by \$5,963,713.98 and is going from \$12,354,202.98 to \$18,317,916.96.

## **PERIOD OF PERFORMANCE**

This modification does not affect the period of performance. The period of performance remains January 24, 2022, through January 2, 2027.

## **SYNOPSIS**

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

## **SCOPE OF WORK**

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

## **RECOMMENDATION**

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00005.

Recommend:

 Expired certificate

 Jana Knapp

Ms. Jana Knapp  
Contract Specialist  
Signed by: JANA KNAPP

Approve:

 Revoked certificate

 Katie Opper

Ms. Katie Opper  
Contracting Officer  
Signed by: Office of Finance and Operations

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>			1. CONTRACT ID CODE	PAGE OF PAGES
				1 15
2. AMENDMENT/MODIFICATION NUMBER  91990022C0014P00005	3. EFFECTIVE DATE  DEC 20, 2023	4. REQUISITION/PURCHASE REQUISITION NUMBER	5. PROJECT NUMBER ( <i>If applicable</i> )	
6. ISSUED BY  US Department of Education 400 Maryland Avenue SW, LBJ-2C274 Washington DC 20202	CODE  CAMLBJ	7. ADMINISTERED BY ( <i>If other than Item 6</i> )  See Block 6	CODE	
8. NAME AND ADDRESS OF CONTRACTOR ( <i>Number, street, county, State and ZIP Code</i> )  FLORIDA STATE UNIVERSITY 874 TRADITIONS WAY TALLAHASSEE FL 32306			(X)	9A. AMENDMENT OF SOLICITATION NUMBER
				9B. DATED ( <i>SEE ITEM 11</i> )
			X	10A. MODIFICATION OF CONTRACT/ORDER NUMBER 91990022C0014
			X	10B. DATED ( <i>SEE ITEM 13</i> )
CODE 00027876	FACILITY CODE	JAN 24, 2022		

**11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS**

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:  
 (a) By completing items 8 and 15, and returning \_\_\_\_\_ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (*If required*) Modification Amount: \$5,963,713.98  
 See Schedule Modification Obligated Amount: \$5,963,713.98

<b>13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14.</b>	
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: ( <i>Specify authority</i> ) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER IN ITEM 10A.
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES ( <i>such as changes in paying office, appropriation data, etc.</i> ) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
X	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes Cost Reimbursement
<input type="checkbox"/>	D. OTHER ( <i>Specify type of modification and authority</i> )

**E. IMPORTANT:** Contractor  is not  is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (*Organized by UCF section headings, including solicitation/contract subject matter where feasible.*)

Please see attached.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER ( <i>Type or print</i> )  Stacey Patterson Vice President for Research Florida State University	16A. NAME AND TITLE OF CONTRACTING OFFICER ( <i>Type or print</i> )  Katie Opper, Contracting Officer 202-987-0207 Katie.Opper@ed.gov		
15B. CONTRACTOR/OFFEROR  Pamela Ray for <small>Digitally signed by Pamela Ray for Date: 2023.12.19 08:25:22 -05'00'</small>  Stacey Patterson, VP for Research  (Signature of person authorized to sign)	15C. DATE SIGNED  12/19/2023	16B. UNITED STATES OF AMERICA  KATIE OPPER <small>Digitally signed by KATIE OPPER Date: 2023.12.19 09:16:11 -05'00'</small>  (Signature of Contracting Officer)	16C. DATE SIGNED  DEC 20, 2023

Previous edition unusable

**STANDARD FORM 30** (REV. 11/2016)  
 Prescribed by GSA FAR (48 CFR) 53.243

**ED 003556**

The purpose of Modification P00005 for contract 91990022C0014 REL Southeast is the following:

- Provide funds in the amount of \$5,963,713.98 for Year 3 of the contract.
- Incorporate a revised deliverable schedule.
- Revise the Alternate Contracting Officer (ACOR) from Chris Boccanfuso to Nicassia Belton.
- The total contract value remains the same at \$27,803,000.00.
- The total contract funding value is increased by \$5,963,713.98 and is going from \$12,354,202.98 to \$18,317,916.96.

Except as provided herein, all other terms and conditions of contract 91990022C0014 remains unchanged and in full force and effect.

#### **Contractor's Statement of Release**

In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's Revised Delivery Schedule "proposal(s) for adjustment," the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable to such facts or circumstances giving rise to the "proposal(s) for adjustment".

## SCHEDULE Continued

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ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0008	<p>Contracting Officer: Katie Opper, 202-987-0207, Katie.Opper@ed.gov</p> <p>Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Nicassia Belton, 202-804-7474, Nicassia.Belton@ed.gov</p> <p>Property Administrator Point of Contact: None</p> <p>Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> <p>(New Line Item)</p> <p>Regional Educational Laboratories (REL) Southeast Year 3 CPFF Funding (Non-Travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117. 0000.000000 \$5,863,713.98</p> <p>Period of Performance: 01/24/2022 to 01/02/2027</p> <p>Pricing Option: Cost-Plus-Award-Fee</p>	1.00	SE	5,863,713.98	5,863,713.98
0009	<p>(New Line Item)</p> <p>Regional Educational Laboratories (REL) Southeast Year 3 Funding (Travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117. 0000.000000 \$100,000.00</p> <p>Period of Performance: 01/24/2022 to 01/02/2027</p> <p>Pricing Option: Cost-Plus-Fixed-Fee</p>	1.00	SE	100,000.00	100,000.00

ED 003558

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SECTION J  
LIST OF ATTACHMENTS

## J.1 Deliverable Schedule

SCHEDULE OF DELIVERABLES						
Deliverable #	Deliverable Name	Draft Date Due	Submitted	Approved	Final Date Due	Comments
<b>TASK 1 - REL Management &amp; Reporting</b>						
1   1   1   1   1   1   1	Summary of REL Kickoff Meeting	NA	NA	NA	2/21/22	
1   2   1   1   1   1   1	Binomonthly Call agendas					
1   2   1   1   1   1   2	Year 1 February Call 1 Agenda	2/7/22	2/7/22	2/9/22		
1   2   1   1   1   1   2	Year 1 February Call 2 Agenda	2/18/22	2/18/22	2/23/22		
1   2   1   1   1   1   3	Year 1 March Call 1 Agenda	3/7/22	3/4/2022	3/7/2022	3/9/22	
1   2   1   1   1   1   4	Year 1 March Call 2 Agenda	3/21/22	3/21/2022	3/21/2022	3/23/22	
1   2   1   1   1   1   5	Year 1 April Call 1 Agenda	4/4/22	4/4/2022	4/6/2022	4/6/22	
1   2   1   1   1   1   6	Year 1 April Call 2 Agenda	4/18/22	4/18/2022	4/18/2022	4/20/22	
1   2   1   1   1   1   7	Year 1 May Call 1 Agenda	5/2/22	5/2/2022	5/4/22		
1   2   1   1   1   1   8	Year 1 May Call 2 Agenda	5/16/22	5/13/2022	5/18/22		
1   2   1   1   1   1   9	Year 1 June Call 1 Agenda	6/6/22	6/6/2022	6/8/22		
1   2   1   1   1   1   10	Year 1 June Call 2 Agenda	6/20/22	6/17/2022	6/17/2022	6/23/22	
1   2   1   1   1   1   11	Year 1 July Call 1 Agenda	7/1/22	7/8/2022	7/11/2022	7/13/22	
1   2   1   1   1   1   12	Year 1 July Call 2 Agenda	7/25/22	7/22/2022	7/22/2022	7/27/22	
1   2   1   1   1   1   13	Year 1 August Call 1 Agenda	8/8/22	8/8/2022	8/10/2022		
1   2   1   1   1   1   14	Year 1 August Call 2 Agenda	8/22/22	8/19/2022	8/22/2022	8/24/22	
1   2   1   1   1   1   15	Year 1 September Call 1 Agenda	9/2/22	9/2/2022	9/2/2022	9/4/22	
1   2   1   1   1   1   16	Year 1 September Call 2 Agenda	9/19/22			9/2/22	
1   2   1   1   1   1   17	Year 1 October Call 1 Agenda	10/5/22	10/3/2022	10/3/2022	10/5/22	Call was cancelled.
1   2   1   1   1   1   18	Year 1 October Call 2 Agenda	10/12/22	10/10/2022	10/19/2022	10/12/22	
1   2   1   1   1   1   19	Year 1 November Call 1 Agenda	10/31/22	10/31/2022	11/2/22		
1   2   1   1   1   1   20	Year 1 November Call 2 Agenda	11/14/22	11/10/2022	11/14/2022	11/16/22	
1   2   1   1   1   1   21	Year 1 December Call 1 Agenda	12/5/22	12/5/2022	12/5/2022	12/7/22	
1   2   1   1   1   1   22	Year 1 December Call 2 Agenda	12/19/22	12/15/2022	12/30/2022	12/21/22	
1   2   1   1   1   1   23	Year 2 January Call 1 Agenda	1/9/23	1/9/2023	1/9/2023	1/1/23	
1   2   1   1   1   1   24	Year 2 January Call 2 Agenda	1/23/23	1/23/2023	1/23/2023	1/25/23	
1   2   1   1   1   1   25	Year 2 February Call 1 Agenda	2/6/23	2/6/2023	2/7/2023	2/8/23	
1   2   1   1   1   1   26	Year 2 February Call 2 Agenda	2/26/23	2/17/2023	2/17/2023	2/23/23	
1   2   1   1   1   1   27	Year 2 March Call 1 Agenda	3/6/23	3/6/2023	3/6/2023	3/8/23	
1   2   1   1   1   1   28	Year 2 March Call 2 Agenda	3/20/23	3/17/2023	3/24/2023	3/29/23	
1   2   1   1   1   1   29	Year 2 April Call 1 Agenda	4/3/23	4/3/2023	4/4/2023	4/5/23	
1   2   1   1   1   1   30	Year 2 April Call 2 Agenda	4/17/23	4/14/2023	4/17/2023	4/19/23	
1   2   1   1   1   1   31	Year 2 May Call 1 Agenda	5/1/23	5/1/2023	5/3/23		
1   2   1   1   1   1   32	Year 2 May Call 2 Agenda	5/15/23	5/12/2023	5/15/2023	5/17/23	
1   2   1   1   1   1   33	Year 2 June Call 1 Agenda	6/5/23	6/2/2023	6/5/2023	6/7/23	
1   2   1   1   1   1   34	Year 2 June Call 2 Agenda	6/19/23	6/16/2023	6/20/2023	6/21/23	
1   2   1   1   1   1   35	Year 2 July Call 1 Agenda	7/10/23	7/7/2023	7/10/2023	7/12/23	
1   2   1   1   1   1   36	Year 2 July Call 2 Agenda	7/24/23	7/21/2023	7/24/2023	7/25/23	
1   2   1   1   1   1   37	Year 2 August Call 1 Agenda	8/7/23	8/4/2023	8/8/2023	8/9/23	
1   2   1   1   1   1   38	Year 2 August Call 2 Agenda	8/21/23	8/18/2023	8/21/2023	8/23/23	
1   2   1   1   1   1   39	Year 2 September Call 1 Agenda	9/4/23	9/5/2023	9/5/2023	9/6/23	
1   2   1   1   1   1   40	Year 2 September Call 2 Agenda	9/18/23	9/15/2023	9/20/2023	9/20/23	
1   2   1   1   1   1   41	Year 2 October Call 1 Agenda	10/2/23	9/29/2023	10/3/2023	10/4/23	
1   2   1   1   1   1   42	Year 2 October Call 2 Agenda	10/16/23	10/13/2023	10/13/2023	10/18/23	
1   2   1   1   1   1   43	Year 2 November Call 1 Agenda	10/30/32	10/27/2023	10/30/2023	11/1/32	
1   2   1   1   1   1   44	Year 2 November Call 2 Agenda	11/13/32	11/7/2023	11/9/2023	11/15/32	
1   2   1   1   1   1   45	Year 2 December Call 1 Agenda	12/4/32	12/1/2023	12/4/2023	12/6/32	
1   2   1   1   1   1   46	Year 2 December Call 2 Agenda	12/24/32	12/1/2023	12/4/2023	12/26/32	Call cancelled
1   2   1   1   1   1   47	Year 3 January Call 1 Agenda	1/8/24			1/10/24	
1   2   1   1   1   1   48	Year 3 January Call 2 Agenda	1/22/24			1/24/24	
1   2   1   1   1   1   49	Year 3 February Call 1 Agenda	2/5/24			2/7/24	
1   2   1   1   1   1   50	Year 3 February Call 2 Agenda	2/19/24			2/21/24	
1   2   1   1   1   1   51	Year 3 March Call 1 Agenda	3/4/24			3/6/24	
1   2   1   1   1   1   52	Year 3 March Call 2 Agenda	3/18/24			3/20/24	
1   2   1   1   1   1   53	Year 3 April Call 1 Agenda	4/1/24			4/3/24	
1   2   1   1   1   1   54	Year 3 April Call 2 Agenda	4/14/24			4/17/24	
1   2   1   1   1   1   55	Year 3 May Call 1 Agenda	5/4/24			5/6/24	
1   2   1   1   1   1   56	Year 3 May Call 2 Agenda	5/20/24			5/22/24	
1   2   1   1   1   1   57	Year 3 June Call 1 Agenda	6/3/24			6/5/24	
1   2   1   1   1   1   58	Year 3 June Call 2 Agenda	6/17/24			6/19/24	
1   2   1   1   1   1   59	Year 3 July Call 1 Agenda	7/8/24			7/10/24	
1   2   1   1   1   1   60	Year 3 July Call 2 Agenda	7/22/24			7/24/24	
1   2   1   1   1   1   61	Year 3 August Call 1 Agenda	8/5/24			8/7/24	
1   2   1   1   1   1   62	Year 3 August Call 2 Agenda	8/19/24			8/21/24	
1   2   1   1   1   1   63	Year 3 September Call 1 Agenda	9/2/24			9/4/24	
1   2   1   1   1   1   64	Year 3 September Call 2 Agenda	9/16/24			9/18/24	
1   2   1   1   1   1   65	Year 3 October Call 1 Agenda	10/7/24			10/9/24	
1   2   1   1   1   1   66	Year 3 October Call 2 Agenda	10/21/24			10/23/24	
1   2   1   1   1   1   67	Year 3 November Call 1 Agenda	11/5/24			11/7/24	
1   2   1   1   1   1   68	Year 3 November Call 2 Agenda	11/19/24			11/21/24	
1   2   1   1   1   1   69	Year 3 December Call 1 Agenda	12/2/24			12/4/24	
1   2   1   1   1   1   70	Year 3 December Call 2 Agenda	12/16/24			12/18/24	
1   2   1   2   1   1   1	Binomonthly call memos	2/16/22	2/11/2022	2/11/2022	2/23/22	
1   2   1   2   1   1   2	Year 1 February Call 1	3/2/22	2/28/2022	3/2/2022	3/2/22	
1   2   1   2   1   1   3	Year 1 February Call 2	3/16/22	3/13/2022	3/13/2022	3/2/23	
1   2   1   2   1   1   4	Year 1 March Call 2	3/20/22	3/25/2022	4/1/2022	4/6/22	
1   2   1   2   1   1   5	Year 1 April Call 1	4/13/22	4/11/2022	4/15/2022	4/2/22	
1   2   1   2   1   1   6	Year 1 April Call 2	4/27/22	4/27/2022	4/29/2022	5/4/22	
1   2   1   2   1   1   7	Year 1 May Call 1	5/11/22	5/6/2022	5/13/2022	5/18/22	
1   2   1   2   1   1   8	Year 1 May Call 2	5/25/22	5/23/2022	5/26/2022	6/1/23	
1   2   1   2   1   1   9	Year 1 June Call 1	6/15/22	6/14/2022	6/22/2022	6/2/23	
1   2   1   2   1   1   10	Year 1 June Call 2	6/29/22	6/24/2022	6/30/2022	7/6/23	
1   2   1   2   1   1   11	Year 1 July Call 1	7/20/22	7/20/2022	7/20/2022	7/27/23	
1   2   1   2   1   1   12	Year 1 July Call 2	8/3/22	8/3/2022	8/10/2022	8/10/23	
1   2   1   2   1   1   13	Year 1 August Call 1	8/17/22	8/17/2022	8/24/2022	8/24/23	
1   2   1   2   1   1   14	Year 1 August Call 2	8/31/22	8/29/2022	8/31/2022	9/7/23	
1   2   1   2   1   1   15	Year 1 September Call 1	9/14/22	9/12/2022	9/15/2022	9/21/22	
1   2   1   2   1   1   16	Year 1 September Call 2	9/28/22			10/4/22	Call 1.2.1.16 was cancelled
1   2   1   2   1   1   17	Year 1 October Call 1	10/1/22	10/5/2022	10/14/2022	10/19/22	
1   2   1   2   1   1   18	Year 1 October Call 2	10/26/22	10/21/2022	10/26/2022	11/2/23	
1   2   1   2   1   1   19	Year 1 November Call 1	11/9/22	11/7/2022	11/16/2022	11/16/22	
1   2   1   2   1   1   20	Year 1 November Call 2	12/1/22	11/18/2022	11/28/2022	11/30/22	
1   2   1   2   1   1   21	Year 1 December Call 1	12/4/22	12/3/2022	12/30/2022	12/31/22	
1   2   1   2   1   1   22	Year 1 December Call 2	12/23/22	12/16/2022	12/30/2022	12/30/23	
1   2   1   2   1   1   23	Year 2 January Call 1	1/18/23	1/13/2023	1/23/2023	1/25/23	
1   2   1   2   1   1   24	Year 2 January Call 2	2/1/23	1/30/2023	2/7/2023	2/8/23	
1   2   1   2   1   1   25	Year 2 February Call 1	2/15/23	2/13/2023	2/21/2023	2/22/23	
1   2   1   2   1   1   26	Year 2 February Call 2	3/1/23	3/1/2023	3/8/2023	3/8/23	
1   2   1   2   1   1   27	Year 2 March Call 1	3/15/23	3/14/2023	3/28/2023	3/2/23	
1   2   1   2   1   1   28	Year 2 March Call 2	3/29/23	3/27/2023	4/4/2023	4/5/23	
1   2   1   2   1   1   29	Year 2 April Call 1	4/12/23	4/10/2023	4/17/2023	4/19/23	
1   2   1   2   1   1   30	Year 2 April Call 2	4/26/23	4/24/2023	4/30/2023	5/1/23	
1   2   1   2   1   1   31	Year 2 May Call 1	5/10/23	5/8/2023	5/16/2023	5/17/23	
1   2   1   2   1   1   32	Year 2 May Call 2	5/24/23	5/22/2023	6/1/2023	5/23/23	
1   2   1   2   1   1   33	Year 2 June Call 1	6/14/23	6/8/2023	6/14/2023	6/21/23	
1   2   1   2   1   1   34	Year 2 June Call 2	6/28/23	6/23/2023	7/5/2023	7/5/23	
1   2   1   2   1   1   35	Year 2 July Call 1	7/19/23	7/14/2023	7/19/2023	7/26/23	
1   2   1   2   1   1   36	Year 2 July Call 2	8/2/23	7/31/2023	8/10/2023	8/9/23	
1   2   1   2   1   1   37	Year 2 August Call 1	8/16/23	8/15/2023	8/18/2023	8/23/23	
1   2   1   2   1   1   38	Year 2 August Call 2	8/30/23	8/29/2023	09/07/223	9/6/23	

1	1	2	1	2	39	Year 2 September Call 1	9/13/23	9/8/2023	9/15/2023	9/20/23	
1	1	2	1	2	40	Year 2 September Call 2	9/27/23	9/22/2023	10/2/2023	10/4/23	
1	1	2	1	2	41	Year 2 October Call 1	10/11/23	10/10/2023	10/19/2023	10/18/23	
1	1	2	1	2	42	Year 2 October Call 2	40/34/24			11/4/23	
											Didn't have this call because of GB.
1	1	2	1	2	43	Year 2 November Call 1	11/8/23	11/6/2023	11/13/2023	11/15/23	
1	1	2	1	2	44	Year 2 November Call 2	11/2/23	11/20/2023	11/22/2023	12/6/23	
1	1	2	1	2	45	Year 2 December Call 1	12/2/23	12/8/2023	12/20/2023		
1	1	2	1	2	46	Year 2 December Call 2	42/3/24			12/29/23	Cancelled
1	1	2	1	2	47	Year 3 January Call 1	1/17/24			12/30/23	
1	1	2	1	2	48	Year 3 January Call 2	1/31/24			1/23/23	
1	1	2	1	2	49	Year 3 February Call 1	2/10/24			1/12/24	
1	1	2	1	2	50	Year 3 February Call 2	2/20/24			1/22/24	
1	1	2	1	2	51	Year 3 March Call 1	3/1/24			3/20/24	
1	1	2	1	2	52	Year 3 March Call 2	3/27/24			4/3/24	
1	1	2	1	2	53	Year 3 April Call 1	4/10/24			4/17/24	
1	1	2	1	2	54	Year 3 April Call 2	4/24/24			5/1/24	
1	1	2	1	2	55	Year 3 May Call 1	5/15/24			5/22/24	
1	1	2	1	2	56	Year 3 May Call 2	5/29/24			6/5/24	
1	1	2	1	2	57	Year 3 June Call 1	6/12/24			6/19/24	
1	1	2	1	2	58	Year 3 June Call 2	6/26/24			7/3/24	
1	1	2	1	2	59	Year 3 July Call 1	7/1/24			7/24/24	
1	1	2	1	2	60	Year 3 July Call 2	7/31/24			8/7/24	
1	1	2	1	2	61	Year 3 August Call 1	8/14/24			8/21/24	
1	1	2	1	2	62	Year 3 August Call 2	8/28/24			9/4/24	
1	1	2	1	2	63	Year 3 September Call 1	9/11/24			9/18/24	
1	1	2	1	2	64	Year 3 September Call 2	9/25/24			10/4/23	
1	1	2	1	2	65	Year 3 October Call 1	10/16/24			10/18/23	
1	1	2	1	2	66	Year 3 October Call 2	10/30/24			11/1/23	
1	1	2	1	2	67	Year 3 November Call 1	11/1/24			11/15/23	
1	1	2	1	2	68	Year 3 November Call 2	11/24/24			12/3/23	
1	1	2	1	2	69	Year 3 December Call 1	12/11/24			12/20/23	
1	1	2	1	2	70	Year 3 December Call 2	12/20/24			12/29/23	
1	1	4				<b>Department presentation briefing materials</b>					
1	1	4	1	1	1	Department presentation briefing materials - Year 3 first meeting	3 weeks before each meeting				
1	1	4	1	1	2	Summary of department presentation - Year 3 first meeting	3 weeks before each meeting				
1	1	4	1	1	3	Summary of department presentation - Year 3 second meeting	3 weeks before each meeting				
1	1	4	1	1	4	Summary of department presentation - Year 3 second meeting	1 week after each meeting				
1	1	5				<b>Identify, establish, maintain and convene the Governing Board</b>					
1	1	5	1	1	1	Report of the Establishment of the Governing Board	5 weeks after award	2/24/2022	2/28/2022	2/28/2022	
1	1	5	1	2	1	Agenda and minutes for Governing Board meeting - Year 1 Spring Governing Board meeting	2/11/22	2/11/2022	3/4/2022	3/4/2022	
1	1	5	1	3	1	Meeting minutes and action items - Year 1 Spring Governing Board meeting	3/21/22	3/21/2022	3/30/2022	4/4/2022	
1	1	5	1	2	2	Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	9/16/2022	9/29/2022		
1	1	5	1	2	3	Meeting minutes and action items - Year 1 Fall Governing Board meeting	10/24/22	10/21/2022	10/26/2022		
1	1	5	1	2	4	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	4/3/2023	4/18/2023		
1	1	5	1	3	3	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	5/3/2023	5/15/2023		
1	1	5	1	2	4	Agenda and materials for Governing Board meeting - Year 2 Fall Governing Board meeting	3 weeks before meeting	9/21/2023	9/26/2023		
1	1	5	1	3	4	Meeting minutes and action items - Year 2 Fall Governing Board meeting	2 weeks after meeting	10/26/2023	10/30/2023		
1	1	5	1	2	5	Agenda and materials for Governing Board meeting - Year 3 Spring Governing Board meeting	3 weeks before meeting				
1	1	5	1	3	5	Meeting minutes and action items - Year 3 Spring Governing Board meeting	2 weeks after meeting				
1	1	5	1	2	6	Agenda and materials for Governing Board meeting - Year 3 Fall Governing Board meeting	3 weeks before meeting				
1	1	5	1	3	6	Meeting minutes and action items - Year 3 Fall Governing Board meeting	2 weeks after meeting				
1	1	6				<b>Bi-Annual Assessment of Progress Report</b>					
1	1	6	1	1	1	Memo: Bi-Annual Assessment of Progress Report	4/15/22	5/2/2022	5/11/2022	5/15/2022	
1	1	6	1	1	2	Bi-Annual Assessment of Progress Report	12/1/22	11/30/2022	1/4/2023	12/31/2022	
1	1	6	1	1	3	Bi-Annual Assessment of Progress Report	6/16/23	6/16/2023	7/7/2023	7/16/2023	Original due date was 06/01/2023. Approved by Janelle via email on 09/31/2023.
1	1	6	1	1	4	Bi-Annual Assessment of Progress Report	12/1/23	12/1/2023		12/31/2023	
1	1	6	1	1	5	Bi-Annual Assessment of Progress Report	6/3/24			7/3/2024	
1	1	6	1	1	6	Bi-Annual Assessment of Progress Report	12/2/24			1/1/2025	
1	1	7				<b>Monthly Progress Report</b>					
1	1	7	1	1	1	Year 1 February Monthly Progress Report	3/15/22	3/11/2022	3/16/2022	3/29/2022	
1	1	7	1	2	1	Year 1 March Monthly Progress Report	4/15/22	4/15/2022	4/18/2022	4/29/2022	
1	1	7	1	3	1	Year 1 April Monthly Progress Report	5/16/22	5/13/2022	5/17/2022	5/30/2022	
1	1	7	1	4	1	Year 1 May Monthly Progress Report	6/17/22	6/13/2022	6/20/2022	6/27/2022	
1	1	7	1	5	1	Year 1 June Monthly Progress Report	7/18/22	7/18/2022	7/25/2022	8/1/2022	
1	1	7	1	6	1	Year 1 July Monthly Progress Report	8/15/22	8/11/2022	8/22/2022	8/29/2022	
1	1	7	1	7	1	Year 1 August Monthly Progress Report	9/16/22	9/16/2022	9/26/2022	9/30/2022	
1	1	7	1	8	1	Year 1 September Monthly Progress Report	10/17/22	10/17/2022	10/20/2022	10/31/2022	
1	1	7	1	9	1	Year 1 October Monthly Progress Report	11/1/22	11/16/2022	11/19/2022	11/29/2022	
1	1	7	1	10	1	Year 1 November Monthly Progress Report	12/15/22	12/14/2022	1/31/2023	12/29/2022	
1	1	7	1	11	1	Year 1 December Monthly Progress Report	1/16/23	1/17/2023	2/16/2023	1/30/2023	
1	1	7	1	12	1	Year 2 January Monthly Progress Report	2/15/23	2/15/2023	2/23/2023	3/1/2023	
1	1	7	1	13	1	Year 2 February Monthly Progress Report	3/15/23	3/13/2023	3/20/2023	3/29/2023	
1	1	7	1	14	1	Year 2 March Monthly Progress Report	4/17/23	4/14/2023	4/14/2023	5/1/2023	
1	1	7	1	15	1	Year 2 April Monthly Progress Report	5/15/23	5/11/2023	5/17/2023	5/29/2023	
1	1	7	1	16	1	Year 2 May Monthly Progress Report	6/15/23	6/12/2023	6/22/2023	6/29/2023	
1	1	7	1	17	1	Year 2 June Monthly Progress Report	7/18/23	7/13/2023	7/18/2023	8/1/2023	
1	1	7	1	18	1	Year 2 July Monthly Progress Report	8/15/23	8/15/2023	8/18/2023	8/29/2023	
1	1	7	1	19	1	Year 2 August Monthly Progress Report	9/15/23	9/14/2023	9/22/2023	9/29/2023	
1	1	7	1	20	1	Year 2 September Monthly Progress Report	10/16/23	10/13/2023	10/20/2023	10/30/2023	
1	1	7	1	21	1	Year 2 October Monthly Progress Report	11/1/23	11/14/2023	11/20/2023	11/29/2023	
1	1	7	1	22	1	Year 2 November Monthly Progress Report	12/15/23			12/30/2023	
1	1	7	1	23	1	Year 2 December Monthly Progress Report	1/17/24			1/20/2024	
1	1	7	1	24	1	Year 3 January Monthly Progress Report	2/15/24			2/20/2024	
1	1	7	1	25	1	Year 3 February Monthly Progress Report	3/15/24			3/29/2024	
1	1	7	1	26	1	Year 3 March Monthly Progress Report	4/15/24			4/29/2024	
1	1	7	1	27	1	Year 3 April Monthly Progress Report	5/15/24			5/29/2024	
1	1	7	1	28	1	Year 3 May Monthly Progress Report	6/17/24			7/1/2024	
1	1	7	1	29	1	Year 3 June Monthly Progress Report	7/16/24			7/30/2024	
1	1	7	1	30	1	Year 3 July Monthly Progress Report	8/15/24			8/29/2024	
1	1	7	1	31	1	Year 3 August Monthly Progress Report	9/17/24			10/1/2024	
1	1	7	1	32	1	Year 3 September Monthly Progress Report	10/1/24			10/2/2024	
1	1	7	1	33	1	Year 3 October Monthly Progress Report	11/15/24			11/20/2024	
1	1	7	1	34	1	Year 3 November Monthly Progress Report	12/16/24			12/30/2024	
1	1	7	1	35	1	Year 3 December Monthly Progress Report	1/16/25			1/30/2025	
1	1	8				<b>Performance reporting</b>					
1	1	8	1	1	1	Performance report 1	Upon request				

1	8	1	2	Performance report 2	Upon request				
1	8	1	3	Performance report 3	Upon request				
1	8	1	4	Performance report 4	Upon request				
1	8	1	5	Performance report 5	Upon request				
1	8	1	6	Performance report 6	Upon request				
1	8	1	7	Performance report 7	Upon request				
<b>1</b>	<b>9</b>			<b>Submission of security documents for low and moderate level clearances</b>					
1	9	1	1	Submission of security documents for low and moderate level clearances	As needed				
<b>1</b>	<b>10</b>			<b>REL evaluation materials</b>					
1	10	1	1	REL evaluation materials	TBD				
<b>TASK 2 - Coordination &amp; Collaboration</b>									
<b>2</b>	<b>1</b>			<b>Lead cross-REL coordination activities</b>					
2	1	1	1	Foundational Literacy Cross-REL working group agenda #1	2 weeks before meeting	5/6/2022	5/13/2022		
2	1	1	2	Foundational Literacy Cross-REL working group memo #1	2 weeks after meeting	5/23/2022	5/25/2022		
2	1	1	2	Foundational Literacy Cross-REL working group agenda #2	2 weeks before meeting	8/10/2022	8/10/2022		
2	1	1	2	Foundational Literacy Cross-REL working group memo #2	2 weeks after meeting	8/26/2022	8/31/2022		
2	1	1	3	Foundational Literacy Cross-REL working group agenda #3	2 weeks before meeting	10/16/2022	10/20/2022		
2	1	2	3	Foundational Literacy Cross-REL working group memo #3	2 weeks after meeting	11/15/2022	11/19/2022		
2	1	1	4	Foundational Literacy Cross-REL working group agenda #4	2 weeks before meeting	1/19/2023	1/23/2023		
2	1	2	4	Foundational Literacy Cross-REL working group memo #4	2 weeks after meeting	2/14/2023	2/21/2023		
2	1	1	5	Foundational Literacy Cross-REL working group agenda #5	2 weeks before meeting	4/21/2023	4/30/2023		
2	1	2	5	Foundational Literacy Cross-REL working group memo #5	2 weeks after meeting	5/19/2023	5/19/2023		
2	1	1	6	Foundational Literacy Cross-REL working group agenda #6	2 weeks before meeting	7/7/2023	7/10/2023		
2	1	2	6	Foundational Literacy Cross-REL working group memo #6	2 weeks after meeting	8/15/2023	08/18/2023		
2	1	1	7	Foundational Literacy Cross-REL working group agenda #7	2 weeks before meeting	10/20/2023	10/24/2023		
2	1	2	7	Foundational Literacy Cross-REL working group memo #7	2 weeks after meeting	11/13/2023	11/16/2023		
2	1	1	8	Foundational Literacy Cross-REL working group agenda #8	2 weeks before meeting				
2	1	2	8	Foundational Literacy Cross-REL working group memo #8	2 weeks after meeting				
2	1	1	9	Foundational Literacy Cross-REL working group agenda #9	2 weeks before meeting				
2	1	2	9	Foundational Literacy Cross-REL working group memo #9	2 weeks after meeting				
2	1	1	10	Foundational Literacy Cross-REL working group agenda #10	2 weeks before meeting				
2	1	2	10	Foundational Literacy Cross-REL working group memo #10	2 weeks after meeting				
2	1	1	11	Foundational Literacy Cross-REL working group agenda #11	2 weeks before meeting				
2	1	2	11	Foundational Literacy Cross-REL working group memo #11	2 weeks after meeting				
2	1	1	12	Foundational Literacy Cross-REL working group agenda #12	2 weeks before meeting				
2	1	2	12	Foundational Literacy Cross-REL working group agenda #12	2 weeks after meeting				
2	1	1	1	Toolkit Development Cross-REL working group agenda #1	2 weeks before meeting	5/5/2022	5/5/2022		
2	1	2	1	Toolkit Development Cross-REL working group memo #1	2 weeks after meeting	5/11/2022	5/16/2022		
2	1	1	2	Toolkit Development Cross-REL working group agenda #2	2 weeks before meeting	5/31/2022	5/31/2022		
2	1	2	2	Toolkit Development Cross-REL working group memo #2	2 weeks after meeting	6/16/2022	6/22/2022		
2	1	1	3	Toolkit Development Cross-REL working group agenda #3	2 weeks before meeting	7/18/2022	7/20/2022		
2	1	2	3	Toolkit Development Cross-REL working group memo #3	2 weeks after meeting	7/27/2022	7/28/2022		
2	1	1	4	Toolkit Development Cross-REL working group agenda #4	2 weeks before meeting	8/9/2022	8/9/2022		
2	1	2	4	Toolkit Development Cross-REL working group memo #4	2 weeks after meeting	8/24/2022	8/26/2022		
2	1	1	5	Toolkit Development Cross-REL working group agenda #5	2 weeks before meeting	9/2/2022	9/7/2022		
2	1	2	5	Toolkit Development Cross-REL working group memo #5	2 weeks after meeting	9/28/2022	10/12/2022		
2	1	1	6	Toolkit Development Cross-REL working group agenda #6	2 weeks before meeting	10/16/2022	10/19/2022		
2	1	2	6	Toolkit Development Cross-REL working group memo #6	2 weeks after meeting	10/26/2022	10/31/2022		
2	1	1	7	Toolkit Development Cross-REL working group agenda #7	2 weeks before meeting	11/2/2022	11/8/2022		
2	1	2	7	Toolkit Development Cross-REL working group memo #7	2 weeks after meeting	12/6/2022	12/15/2022		
2	1	1	8	Toolkit Development Cross-REL working group agenda #8	2 weeks before meeting	12/13/2022	12/28/2022		
2	1	2	8	Toolkit Development Cross-REL working group memo #8	2 weeks after meeting	1/12/2023	1/23/2023		
2	1	1	9	Toolkit Development Cross-REL working group agenda #9	2 weeks before meeting	1/30/2023	2/3/2023		
2	1	2	9	Toolkit Development Cross-REL working group memo #9	2 weeks after meeting	2/21/2023	3/2/2023		
2	1	1	10	Toolkit Development Cross-REL working group agenda #10	2 weeks before meeting	3/3/2023	3/10/2023		
2	1	2	10	Toolkit Development Cross-REL working group memo #10	2 weeks after meeting	3/21/2023	3/28/2023		
2	1	1	11	Toolkit Development Cross-REL working group agenda #11	2 weeks before meeting	4/3/2023	4/4/2023		
2	1	2	11	Toolkit Development Cross-REL working group memo #11	2 weeks after meeting	4/12/2023	4/18/2023		
2	1	1	12	Toolkit Development Cross-REL working group agenda #12	2 weeks before meeting	5/31/2023	6/1/2023		
2	1	2	12	Toolkit Development Cross-REL working group memo #12	2 weeks after meeting	6/14/2023	6/15/2023		
2	1	1	13	Toolkit Development Cross-REL working group agenda #13	2 weeks before meeting	6/27/2023	7/7/2023		
2	1	2	13	Toolkit Development Cross-REL working group memo #13	2 weeks after meeting	7/12/2023	7/12/2023		
2	1	1	14	Toolkit Development Cross-REL working group agenda #14	2 weeks before meeting	7/31/2023	8/8/2023		
2	1	2	14	Toolkit Development Cross-REL working group memo #14	2 weeks after meeting	8/9/2023	8/11/2023		
2	1	1	15	Toolkit Development Cross-REL working group agenda #15	2 weeks before meeting	9/6/2023	9/6/2023		

2	1	1	2	15	b	Toolkit Development Cross-REL working group memo #15	2 weeks after meeting	9/13/2023	9/18/2023		
2	1	1	1	16	b	Toolkit Development Cross-REL working group agenda #16	2 weeks before meeting	10/3/2023	10/3/2023		
2	1	1	2	16	b	Toolkit Development Cross-REL working group memo #16	2 weeks after meeting	10/11/2023	10/19/2023		
2	1	1	1	17	b	Toolkit Development Cross-REL working group agenda #17	2 weeks before meeting	11/2/2023	11/3/2023		
2	1	1	2	17	b	Toolkit Development Cross-REL working group memo #17	2 weeks after meeting	11/17/2023	11/20/2023		
2	1	1	1	18	b	Toolkit Development Cross-REL working group agenda #18	2 weeks before meeting	11/27/2023	11/27/2023		
2	1	1	2	18	b	Toolkit Development Cross-REL working group memo #18	2 weeks after meeting				
2	1	1	1	19	b	Toolkit Development Cross-REL working group agenda #19	2 weeks before meeting				
2	1	1	2	19	b	Toolkit Development Cross-REL working group memo #19	2 weeks after meeting				
2	1	1	1	20	b	Toolkit Development Cross-REL working group agenda #20	2 weeks before meeting				
2	1	1	2	20	b	Toolkit Development Cross-REL working group memo #20	2 weeks after meeting				
2	1	1	1	21	b	Toolkit Development Cross-REL working group agenda #21	2 weeks before meeting				
2	1	1	2	21	b	Toolkit Development Cross-REL working group memo #21	2 weeks after meeting				
2	1	1	1	22	b	Toolkit Development Cross-REL working group agenda #22	2 weeks before meeting				
2	1	1	2	22	b	Toolkit Development Cross-REL working group memo #22	2 weeks after meeting				
2	1	1	1	23	b	Toolkit Development Cross-REL working group agenda #23	2 weeks before meeting				
2	1	1	2	23	b	Toolkit Development Cross-REL working group memo #23	2 weeks after meeting				
2	1	1	1	24	b	Toolkit Development Cross-REL working group agenda #24	2 weeks before meeting				
2	1	1	2	24	b	Toolkit Development Cross-REL working group memo #24	2 weeks after meeting				
2	1	1	1	25	b	Toolkit Development Cross-REL working group agenda #25	2 weeks before meeting				
2	1	1	2	25	b	Toolkit Development Cross-REL working group memo #25	2 weeks after meeting				
2	1	1	1	26	b	Toolkit Development Cross-REL working group agenda #26	2 weeks before meeting				
2	1	1	2	26	b	Toolkit Development Cross-REL working group memo #26	2 weeks after meeting				
2	1	1	1	27	b	Toolkit Development Cross-REL working group agenda #27	2 weeks before meeting				
2	1	1	2	27	b	Toolkit Development Cross-REL working group memo #27	2 weeks after meeting				
2	1	1	1	28	b	Toolkit Development Cross-REL working group agenda #28	2 weeks before meeting				
2	1	1	2	28	b	Toolkit Development Cross-REL working group memo #28	2 weeks after meeting				
2	1	1	1	29	b	Toolkit Development Cross-REL working group agenda #29	2 weeks before meeting				
2	1	1	2	29	b	Toolkit Development Cross-REL working group memo #29	2 weeks after meeting				
2	1	1	1	30	b	Toolkit Development Cross-REL working group agenda #30	2 weeks before meeting				
2	1	1	2	30	b	Toolkit Development Cross-REL working group memo #30	2 weeks after meeting				
2	1	3	1	1	a	Proposal for 18 Month Literacy Cross-REL Public Facing Document	1/31/23	1/23/2023	2/7/2023	2/14/2023	
2	1	3	2	1	b	18 Month Literacy Cross-REL Public Facing Product	6/30/23	5/22/2023	6/12/2023	7/30/2023	
<b>Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments.</b>											
2	3	1	1	1		Signed letter(s) of intent with each regional CC in REL Region	4/25/22	4/20/2022	4/26/2022	5/9/2022	
2	3	1	2	1		Year 1 Annual memo of needs sensing between REL and CCs	3/1/23	2/28/2023	3/8/2023	3/15/2023	
2	3	1	2	2		Year 1 Annual memo of needs sensing between REL and CCs	TBD				
2	3	3	1	1		Year 1 Joint needs sensing summary meeting minutes	12/5/22	12/5/2022	12/20/2022	12/19/2022	
2	3	3	2	2		Year 2 Joint needs sensing summary meeting minutes	TBD				
2	3	3	3	3		Year 3 Joint needs sensing summary meeting minutes	TBD				
<b>Task 3 - Working in Partnership with Stakeholders</b>											
3	1					Conduct needs-sensing and develop partnership					
3	1	1	1	1		Partnership Proposal-South Carolina Professional Learning Community: Emergent Literacy Implementation (SPLCI)	4/29/2022	4/15/2022	4/19/2022	5/31/2022	
3	1	1	1	2		Partnership Proposal-Mississippi Adolescent Literacy (MSAL)	4/29/2022	4/28/2022	5/11/2022	5/31/2022	
3	1	1	1	3		Partnership Proposal-Alabama Research Partnership on Improving English Learner Outcomes (AL ELO)	4/29/2022	4/29/2022	5/11/2022	5/31/2022	
3	1	1	1	4		Partnership Proposal-Florida K-3 Literacy (FLK3)	11/30/2022	9/20/2022		12/30/2022	
3	1	1	1	5		Partnership Proposal-Florida Virtual School Partnership (FLVS)	6/30/2022	6/23/2022	6/29/2022	7/29/2022	
3	1	1	1	6		Partnership Proposal-School Climate and Literacy (SCAL4A)	6/30/2022	6/30/2022	7/22/2022	7/30/2022	
3	1	1	1	7		Partnership Proposal-North Carolina Competency-Based Education Partnership (NCCEB)	4/29/2022	4/29/2022	5/10/2022	5/31/2022	
3	1	1	1	8		Partnership Proposal-Diversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	2/28/2023	2/28/2023	3/9/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.
3	1	1	1	9		New Partnership Proposal	As needed; 2 weeks before meeting				
3	1	1	1	10		New Partnership Proposal	As needed; 2 weeks before meeting				
<b>Maintain partnerships under subtask 3.1</b>											
3	2	1	1	1		Partnership meeting materials and agendas for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	2	1	1	1		Partnership meeting summary memos for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	2	1	1	2		Partnership meeting materials and agendas for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	2	1	2	2		Partnership meeting summary memos for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	2	1	1	3		Partnership meeting materials and agendas for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	
3	2	2	1	3		Partnership meeting summary memos for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	
3	2	1	1	4		Partnership meeting materials and agendas for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	
3	2	1	2	4		Partnership meeting summary memos for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	

3	2	1	5	Partnership meeting materials and agendas for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	
3	2	1	5	Partnership meeting summary memos for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	
3	2	1	6	Partnership meeting materials and agendas for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023	
3	2	2	6	Partnership meeting summary memos for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023	
3	2	1	7	Partnership meeting materials and agendas for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023	
3	2	2	7	Partnership meeting summary memos for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023	
3	2	1	8	Partnership meeting materials and agendas for Year 2 Quarter 4	1/31/2024			2/14/2024	
3	2	2	8	Partnership meeting summary memos for Year 2 Quarter 4	1/31/2024			2/14/2024	
3	2	1	9	Partnership meeting materials and agendas for Year 3 Quarter 1	4/28/2024			5/12/2024	
3	2	2	9	Partnership meeting summary memos for Year 3 Quarter 1	4/28/2024			5/12/2024	
3	2	1	10	Partnership meeting materials and agendas for Year 3 Quarter 2	7/31/2024			8/14/2024	
3	2	2	10	Partnership meeting summary memos for Year 3 Quarter 2	7/31/2024			8/14/2024	
3	2	1	11	Partnership meeting materials and agendas for Year 3 Quarter 3	10/31/2024			11/14/2024	
3	2	2	11	Partnership meeting summary memos for Year 3 Quarter 3	10/31/2024			11/14/2024	
3	2	1	11	Partnership meeting materials and agendas for Year 3 Quarter 4	1/31/2025			2/14/2025	
3	2	2	11	Partnership meeting summary memos for Year 3 Quarter 4	1/31/2025			2/14/2025	
3	2	3	1	Summary of Stakeholder Feedback Survey results for partnerships Year 1	11/30/2022	11/30/2022	12/9/2022	12/14/2022	
3	2	3	2	Summary of Stakeholder Feedback Survey results for partnerships Year 2	11/30/2023	11/30/2023	12/1/2023	12/14/2023	
3	2	3	3	Summary of Stakeholder Feedback Survey results for partnerships Year 3	11/29/2024			12/13/2024	
<b>TASK 4 - Training, Coaching, and Technical Support (TCTS)</b>									
4	1			<b>TCTS Projects</b>					
4	1	1	1	* South Carolina Emergent Literacy Professional Learning Community					
4	1	1	1	** <i>Sarah Hughes</i>					
4	1	1	2	1. Proposal for Project	4/29/2022	4/15/2022	4/21/2022	5/31/2022	
4	1	1	3	1. Materials and Agendas for TCTS Session 1	6/30/2022	6/28/2022	7/12/2023	7/21/2022	
4	1	1	3	2. Materials and Agendas for TCTS Session 2	9/30/2022	9/20/2022	9/30/2022	10/21/2022	
4	1	1	5	1. Interim Project Summary	12/16/2022	12/5/2022	12/15/2022		
4	1	1	3	3. Materials and Agendas for TCTS Session 3	12/30/2022	12/12/2022	12/20/2022	1/20/2023	
4	1	1	3	4. Materials and Agendas for TCTS Session 4	3/31/2023	3/13/2023	3/22/2023	4/21/2023	
4	1	1	4	Stakeholder Feedback Survey	10 working days after final event	4/11/2023	4/17/2023	25 working days after final event	
4	1	1	5	2. Coaching Summary and Stakeholder Feedback Survey Summary	6/30/2023	4/17/2023	4/24/2023	7/21/2023	
4	1	1	2	2. Proposal for Extension Project	8/30/2023	8/14/2023	8/18/2023	9/20/2023	
4	1	1	3	5. Materials and Agendas for Extension Session 5	10/31/2023	10/26/2023	10/30/2023	11/21/2023	
4	1	1	3	6. Materials and Agendas for Extension Session 6	2/28/2024			3/20/2024	
4	1	1	3	7. Materials and Agendas for Extension Session 7	5/31/2024			6/21/2024	
4	1	1	3	8. Materials and Agendas for Extension Session 8	8/31/2024			9/21/2024	
4	1	1	3	9. Materials and Agendas for Extension Session 9	11/30/2024			12/21/2024	
4	1	1	4	2. Extension Project Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	1	5	3. Extension Coaching Summary and Stakeholder Feedback Survey Summary	2/28/2025			3/14/2025	
4	1	1	6	1. Support Plan for PLC Facilitator	7/31/2025			8/14/2025	
4	1	2	*	* Adolescent Literacy Strategies Grades 4-12 Content Implementation Facilitators List					
4	1	2	2	1. Proposal	4/29/2022	4/28/2022	5/3/2022	5/29/2022	
4	1	2	3	1. Materials and Agendas for TCTS Session 1	8/30/2022	6/27/2022	6/30/2022	9/20/2022	
4	1	2	3	2. Materials and Agendas for TCTS Session 2	9/30/2022	7/19/2022	7/20/2022	10/21/2022	
4	1	2	3	3. Materials and Agendas for TCTS Session 3	10/31/2022	8/22/2022	9/7/2022	11/21/2022	
4	1	2	3	4. Materials and Agendas for TCTS Session 4	11/30/2022	9/2/2022	9/9/2022	12/21/2022	
4	1	2	3	5. Materials and Agendas for TCTS Session 5	12/31/2022	12/9/2022	12/15/2022	1/21/2023	
4	1	2	3	6. Materials and Agendas for TCTS Session 6	1/31/2023	1/11/2023	1/23/2023	2/21/2023	
4	1	2	3	9. Implementation/Facilitators Guide	6/30/2023	6/26/2023	7/7/2023	7/21/2023	
4	1	2	4	1. Stakeholder Feedback Survey	10 working days after final event	3/15/2023	3/28/2023	25 working days after final event	
4	1	3	*	* Evidence-Based Intervention Practices Grades 4-8 Literacy Intervention Teachers <i>M/Taylor</i>					
4	1	3	2	1. Proposal	7/29/2022	7/15/2022	7/20/2022	8/28/2022	
4	1	3	3	1. Materials and Agendas for Sessions 1-6 on Multisyllabic Words and Fluency both grade bands	10/30/2022	10/31/2022	12/19/2022	11/20/2022	
4	1	3	3	2. Materials and Agendas for Sessions 7-10 on Vocabulary, both grade bands	6/30/2023	6/22/2023	7/13/2023	7/21/2023	
4	1	3	3	3. Materials and Agendas for Sessions 7A, 7B, 8A, & 8B on Vocabulary, both grade bands	11/30/2023	10/13/2023	10/23/2023	12/21/2023	
4	1	3	4	4. Materials and Agendas for Vocabulary Leadership Walkthrough Session 3	11/30/2023	11/17/2023	11/27/2023	12/21/2023	
4	1	3	4	1. Interim Stakeholder Feedback Survey	7/31/2024			8/21/2024	
4	1	3	5	1. Interim Summary	7/31/2024			8/21/2024	
4	1	3	4	2. Final Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	3	5	2. Final Summary	10 working days after final event			25 working days after final event	
4	1	4	*	* AL ELO--Supporting Implementation of Practice Guide					
4	1	4	1	1. Concept Paper for ALEL--Supporting Implementation of Practice Guide	4/29/2022	4/29/2022	5/11/2022	5/31/2022	
4	1	4	2	1. Proposal	6/30/2022	6/13/2022	7/11/2022	7/30/2022	
4	1	4	3	1. Materials and Agendas for TCTS Session 1	7/12/2022	7/11/2022	7/12/2022	TBD	
4	1	4	3	2. Materials and Agendas for TCTS Session 2	8/12/2022	8/11/2022	8/23/2022		
4	1	4	3	3. Materials and Agendas for TCTS Session 3	9/12/2022	9/10/2022	9/27/2022		
4	1	4	4	4. Materials and Agendas for TCTS Session 4	10/7/2022	10/6/2022	10/14/2022		
4	1	4	5	5. Materials and Agendas for TCTS Session 5	11/29/2022	11/28/2022	12/9/2022	12/13/2022	
4	1	4	6	6. Materials and Agendas for TCTS Session 6	1/17/2023	1/13/2023	1/23/2023	1/31/2023	
4	1	4	7	7. Materials and Agendas for TCTS Session 7	2/4/2023	2/13/2023	2/21/2023	2/28/2023	
4	1	4	8	8. Materials and Agendas for TCTS Session 8	3/4/2023	3/14/2023	3/28/2023		
4	1	4	9	9. Materials and Agendas for Coaching Session 9	4/1/2023	4/11/2023	4/17/2023	4/25/2023	
4	1	4	10	Materials and Agendas for Coach Session 10	TBD	10/10/2023	10/19/2023	TBD	Original due date was 09/08/2023. Request to change due date to TBD approved by Janelle on 09/08/2023.

4	-	1	-	4	-	3	-	11	Materials and Agenda for Coaching Session 11	1/31/2024		2/14/2024	Original due date was 11/16/2023. Janelle approved a revision to 01/31/2024 via email on 11/14/2023.
4	-	1	-	4	-	3	-	12	Materials and Agenda for Coaching Session 12	2/15/2024		2/29/2024	
4	-	1	-	4	-	3	-	13	Materials and Agenda for Coaching Session 13	3/29/2024		4/12/2024	
4	-	1	-	4	-	5	-	1	Interim Project Summary	4/28/2023	5/3/2023	5/12/2023	
4	-	1	-	4	-	4	-	1	Stakeholder Feedback Survey	6/21/2024			25 working days after final event
4	-	1	-	4	-	5	-	2	Final Summary	5/31/2024	5/31/2023	6/2/2023	6/14/2024
4	-	1	-	5	-	1	*	*	FLK5 Implementation of K-5 Literacy Academies	9/30/2022	9/20/2022	10/2/2022	10/30/2022
4	-	1	-	5	-	2	-	1	Concept Paper for FLK5 Implementation of K-5 Literacy Academies	11/30/2022	11/21/2022	12/6/2022	12/30/2022
4	-	1	-	5	-	3	-	1	Materials and Agenda for TCTS Summer Reading Camp Session 1	1/31/2023	1/10/2023	1/23/2023	TBD
4	-	1	-	5	-	4	-	1	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023	25 working days after final event
4	-	1	-	5	-	5	-	1	Post-event Summary for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023	
4	-	1	-	5	-	3	-	2	Materials and Agenda for TCTS Summer Reading Camp Session 2	3/31/2023	2/14/2023	2/28/2023	
4	-	1	-	5	-	4	-	2	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023	
4	-	1	-	5	-	5	-	2	Post-event Summary for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023	
4	-	1	-	5	-	3	-	3	Materials and Agenda for TCTS Content Area Session	4/30/2023	3/30/2023	4/10/2023	
4	-	1	-	5	-	3	-	4	Materials and Agenda for TCTS Content Area Session	5/31/2023	4/19/2023	4/30/2023	
4	-	1	-	5	-	3	-	5	Materials and Agenda for TCTS Content Area Session	6/30/2023	5/8/2023	5/16/2023	
4	-	1	-	5	-	3	-	6	Materials and Agenda for TCTS Content Area Session	7/31/2023	5/9/2023	5/17/2023	
4	-	1	-	5	-	3	-	7	Materials and Agenda for TCTS Content Area Session	8/31/2023	5/12/2023	5/17/2023	
4	-	1	-	5	-	4	-	3	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event			
4	-	1	-	5	-	5	-	3	Post-event Summary for TCTS Content Area Sessions	10 working days after final event			
4	-	1	-	5	-	3	-	8	Materials and Agenda for TCTS Differentiated Instruction Session 1	9/30/2023	7/6/2023	7/10/2023	
4	-	1	-	5	-	3	-	9	Materials and Agenda for TCTS Differentiated Instruction Session 2	10/31/2023	8/10/2023	8/18/2023	
4	-	1	-	5	-	3	-	10	Materials and Agenda for TCTS Differentiated Instruction Session 3	11/30/2023	9/22/2023	9/26/2023	
4	-	1	-	5	-	4	-	4	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event	11/21/2023	11/27/2023	
4	-	1	-	5	-	5	-	4	Post-event Summary for TCTS Content Area Sessions	10 working days after final event	11/21/2023	11/27/2023	
4	-	1	-	6	-	1	*	*	FLVS Identification of Needs	6/30/2022	6/23/2022	6/29/2022	7/29/2022
4	-	1	-	6	-	2	-	1	Concept Paper for FLVS Identification of Needs	8/5/2022	7/22/2022	7/26/2022	9/2/2022
4	-	1	-	6	-	3	-	1	Proposal	10/13/2022	10/13/2022	10/19/2022	10/20/2022
4	-	1	-	6	-	4	-	1	Materials and Agenda for TCTS Session 1A and 1B	12/30/2022	10/29/2022	10/29/2022	11/13/2022
4	-	1	-	6	-	5	-	1	Materials and Agenda for TCTS Session 2	13/1/2023	1/26/2023	3/7/2023	3/14/2022
4	-	1	-	6	-	6	-	1	Materials and Agenda for TCTS Session 3	13/1/2023	1/26/2023	3/7/2023	3/14/2022
4	-	1	-	6	-	5	-	1	Interim Project Summary	12/15/2022	12/12/2022	12/20/2022	12/29/2022
4	-	1	-	6	-	4	-	1	Stakeholder Feedback Survey	10 working days after final event	3/14/2023	3/28/2023	3/28/2023
4	-	1	-	6	-	5	-	2	Final Project Summary	3/14/2023	3/14/2023	3/28/2023	3/28/2023
4	-	1	-	7	-	1	*	*	SCAL-4A Exploring Relationship between School Climate and School Literacy				
4	-	1	-	7	-	2	-	1	Concept Paper for SCAL-4A Exploring Relationship between School Climate and School Literacy	6/30/2022	6/30/2022	7/22/2022	7/30/2022
4	-	1	-	7	-	2	-	1	Proposal	8/31/2022	8/29/2022	8/31/2022	10/15/2022
4	-	1	-	7	-	3	-	1	Materials and Agenda for TCTS Session #1	10/31/2022	10/18/2022	10/24/2022	11/21/2022
4	-	1	-	7	-	3	-	2	Materials and Agenda for TCTS Session #2	12/30/2022	11/28/2022	12/4/2022	1/20/2023
4	-	1	-	7	-	3	-	3	Materials and Agenda for TCTS Session #3	2/28/2023	2/2/2023	2/21/2023	3/21/2023
4	-	1	-	7	-	4	-	1	Materials and Agenda for TCTS Session #4	3/31/2023	3/10/2023	4/4/2023	4/21/2023
4	-	1	-	7	-	5	-	1	Materials and Agenda for TCTS Session #5	4/28/2023	4/17/2023	4/24/2023	5/19/2023
4	-	1	-	7	-	4	-	1	Stakeholder Feedback Survey	7/31/2023	7/27/2023	7/28/2023	25 working days after final event
4	-	1	-	7	-	5	-	1	Final Project Summary	7/31/2023	7/27/2023	7/28/2023	8/14/2023
4	-	1	-	8	-	1	*	*	NCCBE Implementation and Lessons Learned in CBE				
4	-	1	-	8	-	1	*	*	Concept Paper for NCCBE Implementation and Lessons Learned in CBE	4/29/2022	4/29/2022	5/10/2022	5/29/2022
4	-	1	-	8	-	2	-	1	Proposal	6/12/2022	6/1/2022	6/10/2022	7/12/2022
4	-	1	-	8	-	3	-	1	Materials and Agenda for NEEAT TCTS Session #1	9/9/2022	9/7/2022	9/12/2022	9/23/2022
4	-	1	-	8	-	2	-	2	Materials and Agenda for TCTS NHHS Session #1	9/9/2022	9/6/2022	9/12/2022	9/23/2022
4	-	1	-	8	-	3	-	3	Materials and Agenda for NEEAT TCTS Session #2	10/20/2022	10/20/2022	10/26/2022	11/3/2022
4	-	1	-	8	-	3	-	4	Materials and Agenda for NEEAT TCTS Session #3	1/6/2023	1/6/2023	1/17/2023	1/20/2023
4	-	1	-	8	-	3	-	5	Materials and Agenda for NEEAT TCTS Session #4	2/10/2023	2/10/2023	2/21/2023	2/24/2023
4	-	1	-	8	-	3	-	6	Materials and Agenda for NEEAT TCTS Session #5	3/17/2023	3/16/2023	3/28/2023	3/31/2023
4	-	1	-	8	-	3	-	7	Materials and Agenda for NEEAT TCTS Session #6	9/15/2023	9/15/2023	9/21/2023	9/29/2023
4	-	1	-	8	-	3	-	8	Materials and Agenda for NEEAT TCTS Session #7	9/29/2023	9/25/2023	9/26/2023	10/13/2023
													Original due date was 02/03/2023. Date change approved via email by Janelle on 02/03/2023.
													Original due date was 04/07/2023. Date change approved via email by Janelle on 03/30/2023. Date change from 05/12/2023 to 04/07/2023 approved by Janelle on 05/13/2023.
													Additional date change to 08/04/2023 approved by Janelle on 05/24/2023. Further date change to 09/15/2023 approved by Janelle on 07/28/2023.
													Original due date was 08/04/2023. Date change approved via email by Janelle on 05/24/2023. Additional date change to 09/29/2023 approved by Janelle on 07/29/2023.

4	1	8	3	9	Materials and Agenda for NEEAT TCTS Session #8	10/13/2023	9/25/2023	9/28/2023	10/27/2023	Original due date was 09/08/2023. Date change approved via email by Janelle on 05/24/2023.
4	1	8	3	10	Materials and Agenda for NEEAT TCTS Session #9	12/20/2023			1/3/2024	
4	1	8	3	11	Materials and Agenda for NEEAT TCTS Session #10	1/4/2024			1/18/2024	
4	1	8	3	12	Materials and Agenda for NEEAT TCTS Session #11	2/16/2024			3/1/2024	
4	1	8	3	13	Materials and Agenda for NEEAT TCTS Session #12	7/19/2024			8/2/2024	
4	1	8	3	14	Materials and Agenda for NEEAT TCTS Session #13	8/20/2024			9/3/2024	
4	1	8	3	15	Materials and Agenda for NEEAT TCTS Session #14	9/17/2024			10/1/2024	
4	1	8	3	16	Materials and Agenda for NEEAT TCTS Session #15	12/20/2024			1/12/2025	
4	1	8	3	17	Materials and Agenda for NEEAT TCTS Session #16	2/17/2025			3/3/2025	
4	1	8	3	18	Materials and Agenda for NEEAT TCTS Session #17	3/18/2025			4/1/2025	
4	1	8	3	10	Materials and Agenda for TCTS NEHS Session #2	10/27/2022	10/20/2022	10/26/2022	11/10/2022	
4	1	8	3	11	Materials and Agenda for TCTS NEHS Session #3	2/1/2023	1/11/2023	1/23/2023	2/15/2023	Original due date was 01/06/2023. Date change approved via email by Janelle on 1/4/2023.
4	1	8	3	12	Materials and Agenda for TCTS NEHS Session #4	3/1/2023	2/21/2023	3/2/2023	3/15/2023	Original due date was 01/06/2023. Date change approved via email by Janelle on 1/4/2023.
4	1	8	3	13	Materials and Agenda for TCTS NEHS Session #5	TBD			TBD	Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023. Original due date was 09/06/2023, changed date from revised date of 09/01/2023 to TBD per John's email.
4	1	8	3	14	Materials and Agenda for TCTS NEHS Session #6	10/2/2023			10/16/2023	Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023. Project on hold per Kevin on 09/28/2023.
4	1	8	4	1	Stakeholder Feedback Survey NEEAT	10 working days after final event				25 working days after final event
4	1	8	4	2	Stakeholder Feedback Survey NEHS	10 working days after final event				25 working days after final event
4	1	8	5	1	Interim Project Summary	7/31/2023	7/21/2023	7/27/2023	8/14/2023	
4	1	8	5	2	Interim Project Summary	7/31/2024			8/14/2024	
4	1	8	5	3	Final Project Summary	7/31/2025			8/14/2025	
4	1	9	*	* HBCUs Examination of Teacher Preparation Outcomes						
4	1	9	1	1	Concept Paper for HBCUs Examination of Teacher Preparation Outcomes	2/28/2023	2/28/2023	3/8/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.
4	1	9	2	1	Proposal	5/31/2023	5/30/2023	6/2/2023		
4	1	9	3	1	Materials and Agenda for TCTS Sessions #1	8/15/2023	8/10/2023	8/15/2023	8/29/2023	
4	1	9	3	2	Materials and Agenda for TCTS Sessions #2	8/15/2023	8/10/2023	8/15/2023	8/29/2023	
4	1	9	3	3	Materials and Agenda for TCTS Sessions #3	10/16/2023	9/25/2023	9/26/2023	10/30/2023	
4	1	9	3	4	Materials and Agenda for TCTS Sessions #4	11/15/2023	11/9/2023	11/16/2023	11/29/2023	
4	1	9	3	5	Materials and Agenda for TCTS Sessions #5	2/15/2024			2/29/2024	
4	1	9	3	6	Materials and Agenda for TCTS Sessions #6	2/15/2024			2/29/2024	
4	1	9	3	7	Materials and Agenda for TCTS Sessions #7	5/15/2024			5/29/2024	
4	1	9	3	8	Materials and Agenda for TCTS Sessions #8	8/15/2024			8/29/2024	
4	1	9	3	9	Materials and Agenda for TCTS Sessions #9	10/15/2024			10/29/2024	
4	1	9	3	10	Materials and Agenda for TCTS Sessions #10	1/15/2025			1/29/2025	
4	1	9	4	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	9	5	1	Interim Project Summary	5/31/2024				
4	1	9	5	2	Final Project Summary	5/31/2025				
4	1	10	*	* Indian River School District Evaluation Planning						
4	1	10	1	1	Concept Paper	TBD	11/4/2022	TBD		
4	1	10	1	2	Proposal	TBD	12/5/2022	12/15/2022	TBD	
4	1	10	3	1	Materials and Agenda for TCTS Sessions	TBD	1/17/2023	1/24/2023	TBD	
4	1	10	4	1	Stakeholder Feedback Survey	10 working days after final event	3/22/2023	3/28/2023	25 working days after final event	
4	1	11	*	* FLVS	TBD					
4	1	11	1	1	Concept Paper for FLVS	TBD	6/13/2023	6/28/2023	TBD	
4	1	11	1	2	Proposal	TBD	6/2/2023	6/6/2023	TBD	
4	1	11	3	1	Materials and Agenda for TCTS Session #1	TBD	9/25/2023	9/26/2023	TBD	
4	1	11	3	2	Materials and Agenda for TCTS Session #2	TBD	1/27/2023		TBD	
4	1	11	3	3	Materials and Agenda for TCTS Session #3	TBD	1/31/2024		2/14/2024	
4	1	11	3	4	Materials and Agenda for TCTS Session #4	TBD	3/29/2024		4/12/2024	
4	1	11	3	5	Materials and Agenda for TCTS Session #5	TBD	6/28/2024		7/12/2024	
4	1	11	3	6	Materials and Agenda for TCTS Session #6	TBD	8/30/2024		9/13/2024	
4	1	11	3	7	Materials and Agenda for TCTS Session #7	TBD	10/31/2024		11/14/2024	
4	1	11	3	8	Materials and Agenda for TCTS Session #8	TBD	12/31/2024		1/14/2025	
4	1	11	3	9	Materials and Agenda for TCTS Session #9	TBD	1/31/2025		2/14/2025	
4	1	11	3	10	Materials and Agenda for TCTS Session #10	TBD	4/30/2025		5/14/2025	
4	1	11	3	11	Materials and Agenda for TCTS Session #11	TBD	6/30/2025		7/14/2025	
4	1	11	3	12	Materials and Agenda for TCTS Session #12	TBD	8/29/2025		9/12/2025	
4	1	11	3	13	Materials and Agenda for TCTS Session #13	TBD	10/31/2025		11/14/2025	
4	1	11	3	14	Materials and Agenda for TCTS Session #14	TBD	12/31/2025		1/14/2026	
4	1	11	3	15	Materials and Agenda for TCTS Session #15	TBD	1/30/2026		2/13/2026	
4	1	11	3	16	Materials and Agenda for TCTS Session #16	TBD	4/30/2026		5/14/2026	
4	1	11	4	1	Stakeholder Feedback Survey	10 working days after final event	6/30/2026		25 working days after final event	
4	1	11	5	1	Interim Project Summary	7/31/2024				
4	1	11	5	2	Interim Project Summary	7/31/2025				
4	1	11	5	3	Final Project Summary	7/31/2026				
4	1	12	*	* TBD - Year 3 or later	TBD					
4	1	12	1	1	Concept Paper	TBD	11/20/2023	11/22/2023	TBD	
4	1	12	2	1	Proposal	TBD			TBD	
4	1	12	3	1	Materials and Agenda for TCTS Sessions	TBD			TBD	
4	1	12	4	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	12	5	1	Interim Project Summary	TBD				
4	1	12	5	2	Final Project Summary	TBD				
4	1	13	*	* TBD - Year 3 or later	TBD					
4	1	13	1	1	Concept Paper	TBD			TBD	
4	1	13	2	1	Proposal	TBD			TBD	
4	1	13	3	1	Materials and Agenda for TCTS Sessions	TBD			TBD	
4	1	13	4	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	13	5	1	Interim Project Summary	TBD				
4	1	13	5	2	Final Project Summary	TBD				
4	1	14	*	* TBD - Starting Year 3	TBD					

4	1	14	1	1	1	Concept Paper	TBD		TBD			
4	1	14	2	1	1	Proposal	TBD		TBD			
4	1	14	3	1	1	Materials and Agenda for TCIS Sessions	TBD		TBD			
4	1	14	4	1	1	Summary of Stakeholder Feedback Survey results session 1	10 working days after final event		25 working days after final event			
4	1	14	5	1	1	Interim Project Summary	TBD		TBD			
4	1	14	5	2	2	Final Project Summary	TBD		TBD			
4	2	1	1	1	1	Ask an Expert						
4	2	1	1	1	1	Ask an Expert Proposal- FCS Assistance	TBD	3/16/2022	3/18/2022	TBD		
4	2	1	1	1	1	Ask an Expert responses memo for Meeting #1	5/5/22	5/5/22	5/13/2022			
4	2	1	1	1	1	Ask an Expert responses memo for Meeting #2	5/16/22	5/16/22	5/20/2022			
4	2	1	2	1	2	Ask an Expert Proposal	TBD	7/13/22	7/15/22			
4	2	1	2	2	2	Ask an Expert responses memo	5 working days after each meeting with the requestor	9/15/2022	9/16/2022			
4	2	1	3	1	3	Ask an Expert Proposal	TBD	12/15/22	1/4/23			
4	2	1	2	3	3	Ask an Expert responses memo	5 working days after each meeting with the requestor	3/23/2023	4/4/2023			
4	2	1	4	1	4	Ask an Expert Proposal	TBD					
4	2	1	4	1	5	Ask an Expert responses memo	5 working days after each meeting with the requestor					
4	2	1	4	1	5	Ask an Expert Proposal	TBD					
4	2	1	4	1	6	Ask an Expert Proposal	TBD					
4	2	1	4	1	6	Ask an Expert responses memo	5 working days after each meeting with the requestor					
<b>TASK 5 - Applied Research and Peer Reviewed Research-based Development</b>												
<i>Conduct original, empirical research and develop products</i>												
5	1	1	1	1	1	Developing the implementation of the Emergent Literacy PLC <i>Sarah Herrera</i>						
5	1	1	1	1	2	Proposal	4/29/2022	4/28/2022	7/13/2022	9/30/2022		
5	1	1	1	1	3	Notice of IRB approval or exemption	9/30/2022	9/30/2022	10/12/2022	10/21/2022		
5	1	1	1	1	4	Data Management Plan	4/29/2022	4/28/2022	7/13/2022	9/30/2022		
5	1	1	1	1	5	OMB clearance package (if applicable to the study)	9/30/2022	9/30/2022		2/28/2023		
5	1	1	1	1	6	Data sharing agreement	10/14/2022	10/13/2022		11/4/2022		
5	1	1	1	1	6	Research Report	6/30/2025			2/28/2026		
5	1	1	1	1	6	AL ELO HQIA <sup>a</sup>						
5	1	1	1	2	1	Concept Paper	10/31/2022	10/27/2022		11/14/2022		
5	1	1	1	2	2	Proposal	4/30/2023	3/31/2023	7/14/2023	5/21/2023		
5	1	1	2	4	4	Data Management Plan (if applicable to the study)	TBD					
5	1	1	2	4	4	Original due date						
5	1	1	2	4	4	TBD as proposal has not been reviewed by RPR.						
5	1	1	2	4	4	06/30/2023						
5	1	1	2	4	4	Data sharing agreement or memorandum of understanding (optional)						
5	1	1	2	4	4	Original due date was 08/31/2023. Date change approved via email by Janelle on 08/21/2023. Date then changed from 10/31/2023 to 11/17/2023 via email with Janelle on 11/09/2023.	11/17/2023		12/1/2023			
5	1	1	2	7	7	Research Report	6/30/2025		TBD			
5	1	1	3	1	2	Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades <i>Katie Dahlberg</i>						
5	1	1	3	1	2	Proposal Toolkit Evaluation	9/29/2023	9/29/2023		3/31/2023		
5	1	1	3	3	3	Notice of IRB approval or exemption	9/30/2024	9/30/2024				
5	1	1	3	4	4	Data Management Plan	9/29/2023	9/29/2023		3/31/2023		
5	1	1	3	5	5	OMB clearance package	3/30/2024	9/30/2024				
5	1	1	3	6	6	Data sharing agreement or memorandum of understanding	5/31/2025	6/30/2024				
5	1	1	3	7	7	Research Report	7/31/2026	12/30/2026				
5	1	4	1	4	1	TBD						
5	1	4	1	4	1	TBD Year 3 or later						
5	1	4	1	4	1	Concept Paper	TBD					
5	1	4	1	4	2	Proposal	TBD					
5	1	4	1	4	3	Notice of IRB approval or exemption	TBD					
5	1	4	1	4	4	Data Management Plan (if applicable to the study)	TBD					
5	1	4	1	4	5	OMB clearance package (if applicable to the study)	TBD					
5	1	4	1	4	6	Data sharing agreement or memorandum of understanding (optional)	TBD					
5	1	4	1	7	7	Research Report	TBD					
5	1	5	1	5	1	TBD						
5	1	5	1	5	1	TBD Year 3 or later						
5	1	5	1	5	1	Concept Paper	TBD					
5	1	5	1	5	2	Proposal	TBD					
5	1	5	1	5	3	Notice of IRB approval or exemption	TBD					
5	1	5	1	5	4	Data Management Plan (if applicable to the study)	TBD					
5	1	5	1	5	5	OMB clearance package (if applicable to the study)	TBD					
5	1	5	1	5	6	Data sharing agreement or memorandum of understanding (optional)	TBD					
5	1	5	1	7	7	Research Report	TBD					
5	1	6	1	6	1	TBD						
5	1	6	1	6	1	TBD Year 3 or later						
5	1	6	1	6	1	Concept Paper	TBD					
5	1	6	1	6	2	Proposal	TBD					
5	1	6	1	6	3	Notice of IRB approval or exemption	TBD					
5	1	6	1	6	4	Data Management Plan (if applicable to the study)	TBD					
5	1	6	1	6	5	OMB clearance package (if applicable to the study)	TBD					
5	1	6	1	6	6	Data sharing agreement or memorandum of understanding (optional)	TBD					
5	1	6	1	7	7	Applied research written product	TBD					
5	2	1	*	*	*	Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades <i>Marvin Konznotch</i>						
5	2	1	1	2	2	Proposal Toolkit Development	3/31/2022	3/31/2022	7/14/2023	7/29/2022		
5	2	1	1	3	3	Concept Paper	1/31/2024			8/29/2025		
5	2	1	1	4	4	Memo Documenting changes based on usability testing	7/31/2024			9/15/2024		
5	4	1	*	*	*	Develop Tools to Support Research Processes and Research-Based Practices.						
5	4	1	1	1	1	MS Adolescent Literacy PLC						
5	4	1	1	1	1	Concept Paper	TBD	4/11/23	4/21/23			
5	4	1	1	2	2	Proposal	TBD	7/10/23	9/18/23			
5	4	1	1	3	3	Draft Tool	8/31/2025					
5	4	1	1	4	4	Final Tool	8/31/2026					
5	4	1	2	1	1	TBD						
5	4	1	2	1	1	Concept Paper	TBD					
5	4	1	2	1	2	Proposal	TBD					
5	4	1	2	1	3	Notice of IRB approval or exemption	TBD					
5	4	1	2	1	4	Data Management Plan (if applicable to the study)	TBD					

5	4	.2	5	OMB clearance package (if applicable to the study)	TBD			
5	4	.2	6	Data sharing agreement or memorandum of understanding (optional)	TBD			
5	4	.2	7	Conduct assessment of research study quality for ESSA compliance	TBD			
5	5	.1	1	Concept Paper	As needed			
5	5	.2	1	Proposal	As proposed			
5	5	.3	1	Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed			
5	5	.4	1	Summary memo and/or associated materials stakeholders	As proposed			
<b>TASK 6 - Dissemination</b>								
6	1			Develop website content				
6	1			N/A				
6	2			Develop Dissemination Materials				
6	2	.1	1	Infographic 1- SCALAGA Exploring Relationship between School Climate and School Literacy	12/31/2022	7/28/2023	9/12/2023	5/20/2023
6	2	.1	2	Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022	7/6/2022	6/30/2022
6	2	.1	3	Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022	7/6/2022	
6	2	.1	4	Improving Adolescent Literacy Infographic	TBD	7/7/2023	07/13/2024	
6	2	.1	5	Evidence Based Practices for Emergent Literacy Infographic	TBD	7/14/2023	7/19/2023	
6	2	.1	6	Supporting Facilitators Implementing the PLC EL Infographic	TBD	7/13/2023	7/24/2023	
6	2	.1	7	Infographic/factsheet 7	TBD			
6	2	.1	8	Infographic/factsheet 8	TBD			
6	2	.1	9	Infographic/factsheet 9	TBD			
6	2	.1	10	Infographic/factsheet 10	TBD			
Audio Files								
6	2	.2	1	1 Proposal	As needed			
6	2	.2	2	2 Script for audio file 1	TBD			
6	2	.2	3	3 Audio file 1	TBD			
6	2	.2	4	4 Script for audio file 2	As needed			
6	2	.2	5	5 Script for audio file 2	TBD			
6	2	.2	6	6 Audio file 2	TBD			
6	2	.2	7	7 Proposal	As needed			
6	2	.2	8	8 Script for audio file 3	TBD			
6	2	.2	9	9 Audio file 3	TBD			
Videos								
6	2	.3	1	1 Proposal	As needed	10/10/2023	10/19/2023	
6	2	.3	2	2 Script and storyboard for video 1	TBD			
6	2	.3	3	3 Video 1	TBD			
6	2	.3	4	4 Proposal	As needed			
6	2	.3	5	5 Script and storyboard for video 2	TBD			
6	2	.3	6	6 Video 2	TBD			
6	2	.3	7	7 Proposal	As needed			
6	2	.3	8	8 Script and storyboard for video 3	TBD			
6	2	.3	9	9 Video 3	TBD			
6	2	.3	10	10 Proposal	As needed			
6	2	.3	11	11 Script and storyboard for video 4	TBD			
6	2	.3	12	12 Video 4	TBD			
<b>Host events and conference presentations</b>								
6	3	.1	1	SSSR EL SRG	TBD	5/13/2022	5/19/2022	TBD
6	3	.2	1	2 Agenda and materials	2 weeks before event	6/28/2022	6/30/2022	TBD
6	3	.3	1	3 Stakeholder feedback survey	2 weeks after event	7/28/2022	7/29/2022	TBD
6	3	.1	2	4 PAEC Teacher Guides	TBD	5/13/2022	5/19/2022	TBD
6	3	.1	3	5 Agenda and materials	2 weeks before event	7/1/2022	7/12/2022	TBD
6	3	.1	4	6 Stakeholder feedback survey	2 weeks after event			
6	3	.2	1	7 CBE Summer Institute proposal	TBD	7/26/2022	7/27/2022	TBD
6	3	.2	2	8 Agenda and materials	2 weeks before event	7/26/2022	7/27/2022	TBD
6	3	.2	3	9 Stakeholder feedback survey	2 weeks after event	8/23/2022	8/26/2022	TBD
6	3	.1	4	10 MS Literacy Association Conference	TBD	8/30/2022	9/6/2023	TBD
6	3	.2	4	11 Agenda and materials	2 weeks before event	11/15/2022	11/21/2022	TBD
6	3	.1	5	12 FL Association of Teacher Educators Conference	TBD	8/30/2022	9/6/2022	TBD
6	3	.2	5	13 Agenda and materials	2 weeks before event	11/16/2022	11/19/2022	TBD
6	3	.3	5	14 Stakeholder feedback survey	2 weeks after event			
6	3	.3	6	15 Proposal for MS Literacy Association Conference	TBD	9/19/2023	10/27/2023	TBD
6	3	.2	6	16 Agenda and materials	2 weeks before event	11/6/2023	11/13/2023	TBD
6	3	.3	6	17 Stakeholder feedback survey	2 weeks after event			
6	3	.1	7	18 AMTESOL conference proposal	TBD	12/15/2022	12/30/2022	TBD
6	3	.2	7	19 Agenda and materials	2 weeks before event	1/13/2023	1/31/2023	TBD
6	3	.3	7	20 Stakeholder feedback survey	2 weeks after event			
6	3	.1	8	21 HIC Literacy Tools for Coaching proposal	TBD			No SFS will be completed for this event.
6	3	.2	8	22 Agenda and materials	2 weeks before event	3/24/2023	4/4/2023	TBD
6	3	.3	8	23 Stakeholder feedback survey	2 weeks after event			
6	3	.1	9	24 HIC Literacy Tools for Family Literacy proposal	TBD	4/1/2023	4/18/2023	TBD
6	3	.2	9	25 Agenda and materials	2 weeks before event	5/23/2023	6/1/2023	TBD
6	3	.3	9	26 Stakeholder feedback survey	2 weeks after event	6/26/2023	6/27/2023	TBD
6	3	.1	10	27 PAEC Leadership Conference – REL SE Literacy Tools proposal	TBD	4/11/2023	4/17/2023	TBD
6	3	.2	10	28 Agenda and materials	2 weeks before event	6/28/2023	7/7/2023	TBD
6	3	.3	10	29 Stakeholder feedback survey	2 weeks after event	8/2/2023	8/11/2023	TBD
6	3	.1	11	30 Proposal for event or required proposal for conference presentation	As needed			TBD
6	3	.2	11	31 Agenda and materials	2 weeks before event			TBD
6	3	.3	11	32 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	12	33 Engaging Families in K-5 Math: A Toolkit Treat Proposal	As needed	8/25/2023	9/5/2023	TBD
6	3	.2	12	34 Agenda and materials	2 weeks before event	9/5/2023	9/12/2023	TBD
6	3	.3	12	35 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	13	36 Florida Literacy Conference proposal	As needed	12/1/2023	12/8/2023	TBD
6	3	.2	13	37 Agenda and materials	2 weeks before event	12/11/2023		TBD
6	3	.3	13	38 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	14	39 Proposal for event or required proposal for conference presentation	As needed	12/6/2023		TBD
6	3	.2	14	40 Agenda and materials	2 weeks before event			TBD
6	3	.3	14	41 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	15	42 Proposal for event or required proposal for conference presentation	As needed			TBD
6	3	.2	15	43 Agenda and materials	2 weeks before event			TBD
6	3	.3	15	44 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	16	45 Proposal for event or required proposal for conference presentation	As needed	11/29/2023	12/1/2023	TBD
6	3	.2	16	46 Agenda and materials	2 weeks before event			TBD
6	3	.3	16	47 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	17	48 Proposal for event or required proposal for conference presentation	As needed	11/20/2023	11/27/2023	TBD
6	3	.2	17	49 Agenda and materials	2 weeks before event			TBD
6	3	.3	17	50 Stakeholder feedback survey	2 weeks after event			TBD
6	3	.1	18	51 Proposal for event or required proposal for conference presentation	As needed			TBD

6	3	1	2	18	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	18	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	19	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	19	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	19	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	20	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	20	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	20	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	21	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	21	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	21	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	22	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	22	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	22	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	23	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	23	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	23	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	24	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	24	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	24	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	25	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	25	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	25	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	26	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	26	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	26	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	27	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	27	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	27	Stakeholder feedback survey	2 weeks after event		TBD	
6	3	1	1	28	Proposal for event or required proposal for conference presentation	As needed		TBD	
6	3	1	2	28	Agenda and materials	2 weeks before event		TBD	
6	3	1	3	28	Stakeholder feedback survey	2 weeks after event		TBD	
6	4	1	1	1	Newsletter 1 April 2022	3/18/2022	3/22/2022	3/28/2021	4/1/2022
6	4	1	1	2	Newsletter 2 May 2022	4/15/2022	4/15/2022	4/19/2022	4/29/2022
6	4	1	1	3	Newsletter 3 June 2022	5/20/2022	5/17/2022	5/19/2022	6/3/2022
6	4	1	1	4	Newsletter 4 July 2022	6/17/2022	6/17/2022	6/28/2022	7/1/2022
6	4	1	1	5	Newsletter 5 Aug 2022	7/15/2022	7/11/2022	7/12/2022	7/29/2022
6	4	1	1	6	Newsletter 6 Sept 2022	8/19/2022	8/19/2022	8/26/2022	9/2/2022
6	4	1	1	7	Newsletter 7 Oct 2022	9/16/2022	9/15/2022	9/16/2022	9/30/2022
6	4	1	1	8	Newsletter 8 Nov 2022	10/14/2022	10/14/2022	10/20/2022	10/26/2022
6	4	1	1	9	Newsletter 9 Dec 2022	11/11/2022	11/10/2022	11/12/2022	11/25/2022
6	4	1	1	10	Newsletter 10 Jan 2023	12/16/2022	12/9/2022	12/20/2022	12/30/2022
6	4	1	1	11	Newsletter 11 Feb 2023	1/20/2023	1/19/2023	2/3/2023	2/3/2023
6	4	1	1	12	Newsletter 12 March 2023	2/17/2023	2/13/2023	2/22/2023	3/3/2023
6	4	1	1	13	Newsletter 13 April 2023	3/17/2023	3/16/2023	4/4/2023	3/31/2023
6	4	1	1	14	Newsletter 14 May 2023	4/21/2023	4/18/2023	4/28/2023	5/5/2023
6	4	1	1	15	Newsletter 15 June 2023	5/19/2023	5/17/2023	5/18/2023	6/2/2023
6	4	1	1	16	Newsletter 16 July 2023	6/23/2023	6/23/2023	7/5/2023	7/7/2023
6	4	1	1	17	Newsletter 17 August 2023	7/31/2023	7/19/2023	7/19/2023	8/14/2023
6	4	1	1	18	Newsletter 18 September 2023	8/31/2023	8/7/2023	8/20/2023	8/25/2023
6	4	1	1	19	Newsletter 19 Oct 2023	9/30/2023	9/11/2023	9/15/2023	10/1/2023
6	4	1	1	20	Newsletter 20 Nov 2023	10/31/2023	10/16/2023	10/26/2023	11/4/2023
6	4	1	1	21	Newsletter 21 Dec 2023	11/30/2023	11/20/2023	11/28/2023	12/4/2023
6	4	1	1	22	Newsletter 22 Jan 2024	12/8/2023			12/22/2023
6	4	1	1	23	Newsletter 22 Feb 2024	1/19/2024			2/2/2024
6	4	1	1	24	Newsletter 24 March 2024	2/15/2024			2/29/2024
6	4	1	1	25	Newsletter 25 April 2024	3/15/2024			3/29/2024
6	4	1	1	26	Newsletter 26 May 2024	4/16/2024			4/30/2024
6	4	1	1	27	Newsletter 27 June 2024	5/1/2024			5/31/2024
6	4	1	1	28	Newsletter 28 July 2024	6/14/2024			6/28/2024
6	4	1	1	29	Newsletter 29 August 2024	7/19/2024			8/2/2024
6	4	1	1	30	Newsletter 30 Sept 2024	8/16/2024			8/30/2024
6	4	1	1	31	Newsletter 31 Oct 2024	9/16/2024			9/30/2024
6	4	1	1	32	Newsletter 32 Nov 2024	10/17/2024			10/31/2024
6	4	1	1	33	Newsletter 33 Dec 2024	11/15/2024			11/29/2024
6	5	1	1	1	Maintain a blog				
6	5	1	1	2	Blog 1	4/29/2022	4/20/2022	4/27/2022	5/13/2022
6	5	1	1	3	Blog 2	6/29/2022	6/29/2022	7/20/2022	7/14/2022
6	5	1	1	4	Blog 3	8/31/2022	8/23/2022	9/25/2022	9/25/2022
6	5	1	1	5	Blog 4	10/31/2022	10/17/2022	11/1/2022	11/14/2022
6	5	1	1	6	Blog 5	12/16/2022	12/14/2022	1/24/2023	12/30/2022
6	5	1	1	7	Blog 6	3/31/2023	3/27/2023	4/1/2023	4/14/2023
6	5	1	1	8	Blog 7	4/28/2023	4/3/2023	4/28/2023	5/12/2023
6	5	1	1	9	Blog 8	6/30/2023	6/30/2023	7/27/2023	7/14/2023
6	5	1	1	10	Blog 9	10/6/2023	10/4/2023	10/18/2023	10/20/2023
6	5	1	1	11					
6	5	1	1	12					
6	5	1	1	13					
6	5	1	1	14					
6	5	1	1	15					
6	5	1	1	16					
6	6	1	1	1	Maintain a social media presence				
6	6	1	1	2	Tweet 1 Year 1 Quarter 1	4/29/2022	4/18/2022	4/20/2022	5/13/2022
6	6	1	1	3	Tweet 2 Year 1 Quarter 2	7/29/2022	7/25/2022	7/27/2022	8/12/2022
6	6	1	1	4	Tweet 3 Year 1 Quarter 3	10/31/2022	10/4/2022	10/14/2022	
6	6	1	1	5	Tweet 4 Year 1 Quarter 4	1/31/2023	1/5/2023	1/17/2023	2/14/2023
6	6	1	1	6	Tweet 5 Year 2 Quarter 1	7/31/2023	7/10/2023	7/12/2023	7/24/2023
6	6	1	1	7	Tweet 6 Year 2 Quarter 2	10/31/2023	10/10/2023	10/18/2023	11/14/2023
6	6	1	1	8	Tweet 7 Year 2 Quarter 3	1/31/2024			2/14/2024
6	6	1	1	9	Tweet 8 Year 2 Quarter 4	4/30/2024			5/14/2024
6	6	1	1	10	Tweet 9 Year 3 Quarter 1	7/31/2024			8/14/2024
6	6	1	1	11	Tweet 10 Year 3 Quarter 2	10/31/2024			11/14/2024
6	6	1	1	12	Tweet 11 Year 3 Quarter 3	1/31/2025			
6	6	1	1	13	Tweet 12 Year 3 Quarter 4	4/31/2025			
6	7	1	1	1	Branding Materials				
6	7	1	1	2	Proposal for video 1	As needed			
6	7	1	1	3	Script and storyboard for video 1	As needed			
6	7	1	1	4	Video 1	As needed			
6	7	1	1	5	Brochure or handout	As needed			





UNITED STATES DEPARTMENT OF EDUCATION  
OFFICE OF FINANCE AND OPERATIONS  
OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

***Determination and Findings to Revise Deliverables 91990022C0014 - REL Southeast P00006***

Contract Number:	91990022C0014 - REL Southeast
Period of Performance:	January 24, 2022, through January 2, 2027
Acquisition Plan Tracking Number:	663
Purchase Request Number:	N/A
Purchase Amount:	-\$50,000.00 from CLIN 0008
NAICS Code:	611710: Educational Support Services
UEI	JF2BLNN4PJC3
Product and Service Code (PSC):	R499: Support Professional: Other
Service Contract Coding Declaration:	Other Function

**AUTHORITY**

Modification P00004 is executed in accordance with the following contract clauses:

Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

**BACKGROUND**

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

**PURPOSE/ DESCRIPTION OF CHANGES**

- Incorporate a revised deliverable schedule dated 06/2024.
- De-obligate \$50,000.00 from CLIN 0008 (Regional Educational Laboratories (REL) Southeast Year 3 Funding (Non-Travel). This modification will be followed-up with Modification P00007 that adds \$50,000.00 to CLIN 0009 Regional Education Laboratories (REL) Southeast Year 3 Funding (Travel).
- The total contract value will be reduced by \$50,000.00 from \$27,803,000.00 to \$27,753,000.00. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$27,753,000 to \$27,803,000.00. In effect, after Modification P00007, the total contract value will remain the same at \$27,803,000.00.
- The total contract funding will be reduced by \$50,000.00 from \$18,317,916.96 to \$18,267,916.96. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$18,267,916.96. to \$18,317,916.96. In effect, after Modification P00007, the total contract value will remain the same at \$18,317,916.96.

## **FUNDING**

- The total contract value will be reduced by \$50,000.00 from \$27,803,000.00 to \$27,753,000.00. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$27,753,000 to \$27,803,000.00. In effect, after Modification P00007, the total contract value will remain the same at \$27,803,000.00.
- The total contract funding will be reduced by \$50,000.00 from \$18,317,916.96 to \$18,267,916.96. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$18,267,916.96. to \$18,317,916.96. In effect, after Modification P00007, the total contract value will remain the same at \$18,317,916.96.

## **PERIOD OF PERFORMANCE**

This modification does not affect the period of performance. The period of performance remains January 24, 2022, through January 2, 2027.

## **SYNOPSIS**

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

## **SCOPE OF WORK**

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition, nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

## **RECOMMENDATION**

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00006.

Recommend:

7/11/2024

Jana Knapp

Ms. Jana Knapp  
Contract Specialist  
Signed by: Office of Finance and Operations

Approve:

 Expired certificate

Joseph Gibbs

Mr. Joseph Gibbs  
Contracting Officer  
Signed by: Office of Finance and Operations

**Contractor Responsibility Assessment  
for  
FLORIDA STATE UNIVERSITY  
07/11/2024**

Legend		
No Issues Found	Potential Issues	Excluded

**Instructions**

To view information. Click on the applicable topic listed in the Table of Contents. To return to this page click on the Home icon located in the top right-hand corner of the page.

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**FEDDATA CHECK**

A POTOMACWAVE CONSULTING PRODUCT

# Contractor Responsibility Assessment

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

Vendor	Vendor Address	SAM Dates
FLORIDA STATE UNIVERSITY CAGE: 3S772 UEI: JF2BLNN4PJC3	874 TRADITIONS WAY TALLAHASSEE, FL 32306-0001 Congressional District: 02	Activation Date: 11/9/2023 7:00:00 PM Expiration Date: 11/6/2024

## SAM Warnings as of 7/11/2024 01:13:05 PM EST

Vendor Designations *	Yes / No
Exclusion Vendor is found to have an existing exclusion record. The next page provides details	No
Debt Subject to Offset 52.209-11.b.1 - federal tax delinquency, current The Offeror represents that it is a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability.	No
52.209-11.b.2 - convicted of a felony, last 2 years The Offeror represents that it is a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.	No
52.209-2.c.1 Inverted Corporation The Offeror is an inverted domestic corporation or a subsidiary of one.	No
52.209-5.a.1.i.A - presently debarred... The Offeror certifies, to the best of its knowledge and belief, that they are presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency	No
52.209-5.a.1.i.B - criminal offense..., last 3 years The Offeror certifies, to the best of its knowledge and belief, that they have, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property.	No
52.209-5.a.1.i.C - presently indicted The Offeror certifies, to the best of its knowledge and belief, that they are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision	No
52.209-5.a.1.i.D - federal tax delinquency, last 3 years The Offeror certifies, to the best of its knowledge and belief, that they have, within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds \$3,500 for which the liability remains unsatisfied.	No
52.209-5.a.1.ii - term for default, last 3 years The Offeror has, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.	No
FAR 52.204-26.c.1 and/or 52.212-3.v.2.i Covered Telecommunications Equipment or Services The Offeror represents that it does provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.	No
FAR 52.204-26.c.2 and/or 52.212-3.v.2.ii Covered Telecommunications Equipment or Services After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it does use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.	No
Vendor has at least one SAM R/Q record or FPDS Termination for Cause or Default The next page provides details	No

\*See Appendix A for what is required for each of the above SAM designations.

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications.

SAM Responsibility / Qualification (Formerly FAPIIS) Summary

Record Type	Count
Administrative Agreement	0
Defective Pricing	0
DoD Determination of Contractor Fault	0
Information on Trafficking in Persons	0
Non-Responsibility Determination	0
Recipient Not-Qualified Determination	0
Subcontractor Payment Issues	0
Termination for Cause	0
Termination for Default	0
Termination for Material Failure to Comply	0

SAM Responsibility / Qualification (Formerly FAPIIS) Detail

Record Type	PIID	Ref PIID	Recorded On
No data to display			
Record Type	Contract Info	Ref PIID	Date Signed
No data to display			

FPDS data, from the prior five years, is accurate as of 7/9/2024 & and all SAM R/Q data is accurate as of 7/11/2024 10:02:13 AM EST

**Disclaimer:**

If adverse action is considered as a result of information in this report it is recommended that contracting personnel: 1) per FAR 9.104-5 promptly request additional, possibly clarifying information from the offeror, and 2) validate the information in SAM and/or FPDS for accuracy and recency.

This Report is based on data and information obtained from U.S. federal databases, including the Federal Procurement Data System database and the System for Award Management database. This Report is provided "as is". FedDataCheck and PotomacWave Consulting Inc. make no representation or warranty, express, implied or otherwise, as to the accuracy or completeness of the data and information contained in this Report. Any alert or warning identified in this Report should be independently verified -- per FAR 9.104-5(a)(1) and per FAR 9.104-5(b)(1) requests for additional information from the offeror should be made promptly. To the extent any alert or warning identified in this Report contains or may contain an error or inaccuracy, the relevant U.S. federal agency should be contacted to correct such error or inaccuracy. FedDataCheck and PotomacWave Consulting Inc. shall have no liability to any party resulting from the use of, or content contained in, this Report, and any action taken by (or omission of) a party relying on this Report shall be the sole responsibility of such party.

# Business Types and Certifications

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

## Self Certified Business Types

Business Type	SAM Glossary Definition
Business or Organization	
Educational Institution	
Non-Profit Organization	A Nonprofit Organization is an organization that uses its surplus revenues to achieve its goals rather than distribute them as profit or dividends. The IRS defines this status under Internal Revenue Code 501(c).
State Controlled Institution of Higher Learning	

## Certified Business Types

Business Type	Certified By	Last Verified Date / Entry Date	Expiration Date / Exit Date
No data to display			

SBA Certified Business Types include: SBA Certified 8(a) Joint Venture; SBA Certified 8(a) Program Participant; SBA Certified Hub Zone Firm; SBA Certified HUBZone Firm; SBA-Certified Economically Disadvantaged Women-Owned Small Business; SBA-Certified Women-Owned Small Business

# Small Business Representations By NAICS

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

## Small Business Representations

The Small Business Administration (SBA), through public rule-making, assigns thresholds to the individual NAICS codes that are used to assess if entities may be considered a small business in certain classification areas. The below list shows business size classifications by NAICS code for this vendor in SAM.gov.

NAICS Code	NAICS desc	Exception String	Small Business *
541330	Engineering Services	NNNN	N
541713	Research and Development in Nanotechnology		N
541714	Research and Development in Biotechnology (except Nanobiotechnology)		N
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	NNNN	N
541720	Research and Development in the Social Sciences and Humanities		N
611310	Colleges, Universities, and Professional Schools		N

\* Small Business Size is determined by the values in SAM for each NAICS unless there is an exception. In that case, the size is determined by: all Y in exception string then it is a small business; all N in exception string then it is not a small business; and a combination of Y and N will result in an Unknown (U) business size.

# Contractor Contacts and CAGE Information

SAM / GSA eLibrary / NITAAC - Contractor POC and CAGE Information

## Contact Info from SAM

Contact Type	Name	Phone / Fax	Email	Address
Alternate Electronic Business	EILEEN CAMPANALE			874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306-4166
Alternate Government Business	EILEEN CAMPANALE			874 TRADITIONS WAY 3RD FL TALLAHASSEE, FL 32306-4166
Alternate Past Peformance	Russell Lentz			SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306-4166
Alternate Proceedings	Esther Wheeler			SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306
Electronic Business	Esther Wheeler			SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306
Government Business	Esther Wheeler			SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306
Past Peformance	Russell Lentz			874 Traditions Way, 3rd Floor Tallahassee, FL 32306
Proceedings	Esther Wheeler			SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306

## Contact Info from NITAAC

Contact Type	Name	Phone	Email	Address
No data to display				

## Contact Info from GSA e-Library

Contact Type	Name	Phone	Email	Address
No data to display				

## CAGE Info from SAM

Entity Identifier	CAGE	Address Type	Address
	3S772	Physical	874 TRADITIONS WAY, TALLAHASSEE, FL 32306-0001
	3S772	Mailing	874 TRADITIONS WAY, TALLAHASSEE, FL 32306-4166

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

## Foreign End Product Response(52.212 - 3.f)

Are any end products delivered to the Government by FLORIDA STATE UNIVERSITY foreign (nondomestic) end products?

Vendor will provide information with specific offers to the Government

### Foreign End Products Supplied by Vendor as designated in SAM

The following are end products that the contractor has designated in SAM that are sourced from a foreign country. A check mark signifies the contractor has included that product in their FAR response to that section in SAM. FAR 52.212.3.f refers to Buy American Certificates and FAR 52.212.3.g refers to Buy American and/or Trade Agreements Certificates.

End Product	Country	52.212.3.f.2	52.212.3.g.1.ii	52.212.3.g.1.iii	52.212.3.g.2	52.212.3.g.3	52.212.3.g.4.ii	52.212.3.g.5.ii
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No data to display

Links: [FAR](#)

# FPDS Overview: Prior two years

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

## FPDS Overview for Current and the Prior Fiscal Year

US Contracting Department	Obligated Amount	Transactions
Agency For International Development	\$0	2
Commerce	(\$1,250)	4
Dept Of Defense	\$2,681,884	17
Education	\$13,089,721	4
Interior	\$14,065	8

## FPDS Overview for Current and the Prior Fiscal Year

PSC Description	Obligated Amount	Transactions
1905 - Combat Ships And Landing Vessels	\$2,044,967	9
AC12 - R&D- Defense System: Aircraft (Applied Research/Exploratory Development)	\$0	1
AH91 - R&D- Environmental Protection: Other (Basic Research)	\$466,280	2
AJ11 - R&D- General Science/Technology: Physical Sciences (Basic Research)	\$170,637	1
AN42 - R&D- Medical: Health Services (Applied Research/Exploratory Development)	\$0	2
B529 - Special Studies/Analysis- Scientific Data	\$22,000	3
B599 - Special Studies/Analysis- Other	\$8,840	1
F020 - Natural Resources/Conservation- Fisheries Resources Management	(\$23,250)	1
Q301 - Medical- Laboratory Testing	\$0	1
R427 - Support- Professional: Weather Reporting/Observation	\$0	1
R499 - Support- Professional: Other	\$13,089,721	4
R799 - Support- Management: Other	\$738	4
U008 - Education/Training- Training/Curriculum Development	\$0	2
W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	\$4,486	3

## FPDS Overview for Current and the Prior Fiscal Year

NAICS Description	Obligated Amount	Transactions
335311 - Power, Distribution, and Specialty Transformer Manufacturing	\$2,044,967	9
483114 - Coastal and Great Lakes Passenger Transportation	(\$23,250)	1
541330 - Engineering Services	\$0	1
541380 - Testing Laboratories and Services	\$0	1
541714 - Research and Development in Biotechnology (except Nanobiotechnology)	\$0	2
541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$658,917	7
541990 - All Other Professional, Scientific, and Technical Services	\$4,486	3
611310 - Colleges, Universities, and Professional Schools	\$9,578	5
611710 - Educational Support Services	\$13,089,721	6

# FPDS: Most Recent 25 Transactions

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

FPDS Transactions					
Contracting Dept	Contract Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Commerce	1305M220PNFFN0463 Mod: P24008	5/10/2024	\$11,000	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) B529 - Special Studies/Analysis-Scientific Data	SHARK PUPPING SURVEYS
Interior	140FS324P0166 Mod: 0	4/4/2024	\$8,840	611310 - Colleges, Universities, and Professional Schools B599 - Special Studies/Analysis-Other	VEGETATION STUDY-LOWER SUWANNEE NWR, FL
Dept Of Defense	N0002421C4113 Mod: P00012	1/29/2024	\$33,458	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.
Dept Of Defense	W912HQ20C0062 Mod: P00006	1/3/2024	\$200,500	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) AH91 - R&D- Environmental Protection: Other (Basic Research)	
Education	91990022C0014 Mod: P00005	12/19/2023	\$5,963,714	611710 - Educational Support Services R499 - Support- Professional: Other	REL SOUTHEAST REGION AWARD.
Dept Of Defense	N0002421C4113 Mod: P00011	11/15/2023	\$565,000	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.

# FPDS: Most Recent 25 Transactions

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Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

FPDS Transactions					
Contracting Dept	Contract Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Dept Of Defense	N0002421C4113 Mod: P00010	10/18/2023	\$0	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.
Interior	140G0123P0115 Mod: P00001	10/16/2023	(\$14,997)	541990 - All Other Professional, Scientific, and Technical Services W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	UNOLS RESEARCH VESSEL
Interior	140D0421P0124 Mod: P00006	9/26/2023	(\$24,502)	611310 - Colleges, Universities, and Professional Schools R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY
Dept Of Defense	W912HQ23C0091 Mod: 0	9/20/2023	\$170,637	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) AJ11 - R&D- General Science/Technology: Physical Sciences (Basic Research)	SERDP PROJECT ER23-3798 "IN SITU BIOREMEDIATION OF 1,4-DIOXANE AT LOW CONCENTRATIONS: METABOLIC DEGRADATION WITH MIXED CULTURE ON COMMERCIALLY AVAILABLE PARTICLE MEDIA"
Dept Of Defense	N0002421C4113 Mod: P00009	9/5/2023	\$0	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.
Dept Of Defense	N0002421C4113 Mod: P00008	8/24/2023	\$177,020	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.

# FPDS: Most Recent 25 Transactions

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FPDS Transactions					
Contracting Dept	Contract Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Agency For International Development	72061220P00001 Mod: P00004	8/1/2023	\$0	611710 - Educational Support Services U008 - Education/Training-Training/Curriculum Development	TECHNICAL ASSISTANCE FOR NATIONAL READING PROGRAM (NRP)IMPLEMENTATION AND EXPANSION
Education	91990022C0014 Mod: P00004	7/18/2023	\$803,000	611710 - Educational Support Services R499 - Support- Professional: Other	REL SOUTHEAST REGION AWARD.
Dept Of Defense	N0002421C4113 Mod: P00007	7/10/2023	\$989,489	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.
Commerce	1305M220PNFFN0463 Mod: P23005	7/6/2023	\$11,000	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) B529 - Special Studies/Analysis-Scientific Data	SHARK PUPPING SURVEYS
Interior	140D0421P0124 Mod: P00005	6/22/2023	\$25,241	611310 - Colleges, Universities, and Professional Schools R799 - Support- Management: Other	RECRUITING SERVICES - FLORIDA STATE UNIVERSITY
Dept Of Defense	FA252120P0042 Mod: P00001	5/26/2023	\$0	541330 - Engineering Services R427 - Support- Professional: Weather Reporting/Observation	CUMULUS ELECTRIFICATION STUDY - PHASE 2
Commerce	1305M220PNFFN0463 Mod: P23004	5/17/2023	\$0	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) B529 - Special Studies/Analysis-Scientific Data	SHARK PUPPING SURVEYS
Dept Of Defense	N0002421C4113 Mod: P00006	4/20/2023	\$130,000	335311 - Power, Distribution, and Specialty Transformer Manufacturing 1905 - Combat Ships And Landing Vessels	FLORIDA STATE UNIVERSITY - CENTER FOR ADVANCED POWER SYSTEMS (FSU-CAPS), TALLAHASSEE, FLORIDA, FOR RESEARCH AND DEVELOPMENT ACTIVITIES OF NAVY ADVANCED SHIPBOARD ELECTRICAL POWER AND ENERGY SYSTEMS AND COMPONENTS.

Combines data from FPDS and SAM to provide an overview of a vendor's contracting history and certifications

## FPDS Transactions

Contracting Dept	Contract Info	Date Signed	Obligated Amount	NAICS & PSC	Contract description on base award
Interior	140G0123P0115 Mod: 0	4/19/2023	\$23,750	541990 - All Other Professional, Scientific, and Technical Services W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	UNOLS RESEARCH VESSEL
Dept Of Defense	W912HQ20C0062 Mod: P00005	4/14/2023	\$265,780	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) AH91 - R&D- Environmental Protection: Other (Basic Research)	
Dept Of Defense	FA865021C5263 Mod: P00002	3/6/2023	\$0	541715 - Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) AC12 - R&D- Defense System: Aircraft (Applied Research/Exploratory Development)	DESIGN AND SCALE-UP MANUFACTURING OF AEROSPACE COMPOSITES FOR ENHANCED ELECTROMAGNETIC MULTIFUNCTIONAL PERFORMANCE
Commerce	1333MF21PNFFN013 5 Mod: P23003	2/10/2023	(\$23,250)	483114 - Coastal and Great Lakes Passenger Transportation F020 - Natural Resources/Conservation-Fisheries Resources Management	VESSEL CHARTER WITH CRUISING SPEED OF AT LEAST 10 KNOTS FOR DEPLOYMENT AND RETRIEVAL OF STATIONARY VIDEO CAMERAS AND FISH TRAPPING
Interior	140G0122P0075 Mod: P00001	2/7/2023	(\$4,266)	541990 - All Other Professional, Scientific, and Technical Services W020 - Lease Or Rental Of Equipment- Ship And Marine Equipment	UNOLS R/V APALACHEE RENTAL

Only displaying 25 most recent transactions (if they exist) for the vendor from the past 5 years.

# Market Research

Utilizes data from GSA eLibrary to provide contracting vehicles for the contractor

## Vendor GSA eLibrary Information

Source	Title	Contract Number	Contract End Date	Link to Pricelist	Link to Category	Link to Catalog
No data to display						

# Category Management

Utilizes data from D2D Acquisition Gateway to provide contracting vehicles for the contractor

## Vendor Category Management Tier 1, 2, and BIC Vehicles

Contract Number	Tier Level	Vehicle Name	PSC Code	LDTO / Ult. Completion Date
No data to display				

# Appendix A - External References

Links to FAR, Federal Register and SAM

## Appendix A

### SAM Designation: Debarred Vendor

Links:

**SAM**

If a box has a check mark and is associated with Debarred Vendor see below exclusion details.

#### **Ineligible (Proceedings Pending)**

Nature (Cause) Preliminary ineligible based upon adequate evidence of conduct indicating a lack of business honesty or integrity, or a lack of business integrity, or regulation, statute, executive order or other legal authority, pending completion of an investigation and/or legal proceedings; or based upon initiation of proceedings to determine final ineligibility based upon regulation, statute, executive order or other legal authority or a lack of business integrity or a preponderance of the evidence of any other cause of a serious and compelling nature that it affects present responsibility.

#### Effect Procurement:

Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so.

#### Nonprocurement:

No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined preliminary ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The termination date will be listed as "Indefinite" (Indef.) unless otherwise specified.

#### **Ineligible (Proceedings Completed)**

Nature (Cause) Determined ineligible upon completion of administrative proceedings establishing by preponderance of the evidence of a cause of a serious and compelling nature that it affects present responsibility; or determined ineligible based on other regulation, statute, executive order or other legal authority.

Effect Procurement: Agencies shall not solicit offers from, award contracts to renew, place new orders with, or otherwise extend the duration of current contracts, or consent to subcontracts in excess of \$35,000 (other than commercially available off-the-shelf items (COTS)), with these contractors unless the agency head (or designee) determines in writing there is a compelling reason to do so.

#### Nonprocurement:

No agency in the Executive Branch shall enter into, renew, or extend primary or lower tier covered transactions to a participant or principal determined ineligible unless the head of the awarding agency grants a compelling reasons exception in writing. Additionally, agencies shall not make awards under certain discretionary Federal assistance, loans, benefits (or contracts there under); nor shall an ineligible person participate as a principal, including but not limited to, agent, consultant, or other person in a position to handle, influence or control Federal funds, or occupying a technical or professional position capable of substantially influencing the development or outcome of a funded activity; nor act as an agent or representative of other participants in Federal assistance, loans and benefits programs. Contact the award agency for questions regarding the extent of Nonprocurement transaction award ineligibility. The period of ineligibility is specified by the termination date.

#### **Prohibition/Restriction**

Nature (Cause) May be subject to sanctions pursuant to the conditions imposed by the U.S. Department of the Treasury (Treasury) Office of Foreign Assets Control (OFAC), or subject to a sanction, restriction or partial denial pursuant to the conditions imposed by the U.S. Department of State (STATE) or Federal agency of the U.S. Government.

#### Effect

If you think you have a potential match with an OFAC listing, please visit the following section of [OFAC's website](#) for guidance. For all other prohibitions and restrictions, see the agency note in the Additional Comments field to ascertain the extent or limit on the sanction, restriction or partial denial. If there is no note, contact the agency taking the action for this information.

#### **Voluntary Exclusion**

Nature (Cause) Accepted an agreement to be excluded under the terms of a settlement between the person and one or more agencies. Effect These persons are excluded in accordance with the terms of their voluntary exclusion agreement. See the agency note in the Additional Comments field to ascertain the extent of the exclusion or the limit on the person's participation, in covered transactions. If there is no note, contact the agency taking the action for this information.

# Appendix A - External References

## Links to FAR, Federal Register and SAM

### Appendix A

#### SAM Designation: 52.204-26 or 52.212-3.v.2

Links:  **FED**  **FAR**

If a box has a check mark and is associated with FAR 52.204-26 or FAR 52.212-3.v.2

- Federal Register Citation 85 FR 42665
  - I. Background. Section 889(a)(1)(B) of the John S. McCain National Defense Authorization Act (NDAA) for Fiscal Year 2019 (Pub. L. 115-232) prohibits executive agencies from entering into, or extending or renewing, a contract with an entity that uses any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. The provision goes into effect August 13, 2020.
- FAR 4.2103 (a)(1)(i) If the offeror selects "does not" in response to the provision at 52.204-26 or 52.212-3(v), the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures.
- FAR 4.2103 (a)(1)(ii) If the offeror selects "does" in response to the provision at 52.204-26 or 52.212-3(v), the offeror must complete the representation at 52.204-24.
- FAR 4.2103 (a)(2)(i) If the offeror selects "will not" in paragraph (d) of the provision at 52.204-24, the contracting officer may rely on the representation, unless the contracting officer has reason to question the representation. If the contracting officer has a reason to question the representation, the contracting officer shall follow agency procedures.
- FAR 4.2103 (a)(2)(ii) If an offeror selects "will" in paragraph (d) of the provision at 52.204-24, the offeror must provide the information required by paragraph 52.204-24(e), and the contracting officer shall follow agency procedures.
- FAR 4.2103 (b) Reporting. If a contractor provides a report pursuant to paragraph (d) of the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment, follow agency procedures.

#### SAM Designation: Debt Subject to Offset

Links:  **FAR**

If a box has a check mark and is associated with Debt Subject to Offset

- FAR 32.1108(b)(2)(i) When it is contemplated that the Governmentwide commercial purchase card will be used as the method of payment, and the contract or order is above the micro-purchase threshold, contracting officers are required to verify by looking in the System for Award Management (SAM) whether the contractor has any delinquent debt subject to collection under the Treasury Offset Program (TOP) at contract award and order placement. Information on TOP is available at <http://fms.treas.gov/debt/index.html>.
- FAR 32.1108(b)(2)(ii) The contracting officer shall not authorize the Governmentwide commercial purchase card as a method of payment during any period the SAM indicates that the contractor has delinquent debt subject to collection under the TOP. In such cases, payments under the contract shall be made in accordance with the clause at 52.232-33, Payment by Electronic Funds Transfer-System for Award Management, or 52.232-34, Payment by Electronic Funds Transfer-Other Than System for Award Management, as appropriate (see FAR 32.1110(d)).
- FAR 32.1108(b)(2)(iii) Contracting officers shall not use the presence of the SAM debt flag indicator to exclude a contractor from receipt of the contract award or issuance or placement of an order.
- FAR 32.1108(b)(2)(iv) The contracting officer may take steps to authorize payment by Governmentwide commercial purchase card when a contractor alerts the contracting officer that the SAM debt flag indicator has been changed to no longer show a delinquent debt.

#### SAM Designation: 52.209-11

Links:  **FAR**

If a box has a check mark and is associated with FAR 52.209-11

- FAR 9.104-5(b)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405);
- FAR 9.104-5(b)(2) Notify, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action; and
- FAR 9.104-5(b)(3) Not award to the corporation unless an agency suspending or debarring official has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government.

#### SAM Designation: 52.209-5

Links:  **FAR**

If a box has a check mark and is associated with FAR 52.209-5

- FAR 9.104-5(a)(1) Promptly, upon receipt of offers, request such additional information from the offeror as the offeror deems necessary in order to demonstrate the offeror's responsibility to the contracting officer (but see 9.405); and
- FAR 9.104-5(a)(2) Notify, prior to proceeding with award, in accordance with agency procedures (see 9.406-3(a) and 9.407-3(a)), the agency official responsible for initiating debarment or suspension action, where an offeror indicates the existence of an indictment, charge, conviction, or civil judgment, or Federal tax delinquency in an amount that exceeds \$3,500.

# FAR Report

## FLORIDA STATE UNIVERSITY

Unique Entity ID

**JF2BLNN4PJC3**

Certification Validity From:

**Tue Nov 07 11:32:55 EST 2023**

Purpose of Registration

**All Awards**

CAGE/NCAGE

**3S772**

Certification Validity To:

**Wed Nov 06 11:32:55 EST 2024**

### CERTIFICATION

I have read each of the FAR and DFARS provisions presented on this page. By submitting this certification, I, **Esther Wheeler**, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to criminal prosecution under Section 1001, Title 18 of the United States Code or civil liability under the False Claims Act if I misrepresent **FLORIDA STATE UNIVERSITY** in any of these representations or certifications to the Government.

By maintaining an active entity registration in SAM, the entity complied with requirements to report proceedings data in accordance with:

- FAR 52.209-7 Information Regarding Responsibility Matters and with requirements to report executive compensation data in accordance with
- FAR 52.204-10 Reporting Executive Compensation and First-Tier Subcontract Awards.

### READ ONLY PROVISIONS

#### FAR 52.203-11

Sep 2007

#### Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions

(a) Definitions. As used in this provision—"Lobbying contact" has the meaning provided at 2 U.S.C. 1602(8). The terms "agency," "influencing or attempting to influence," "officer or employee of an agency," "person," "reasonable compensation," and "regularly employed" are defined in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions"(52.203-12).

(b) Prohibition. The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby

incorporated by reference in this provision.

(c) Certification. The offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.

(d) Disclosure. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not report regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.

(e) Penalty. Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 U.S.C. 1352. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

**(End of Provision)**

**FAR 52.203-18**

JAN 2017

**Prohibition on Contracting with Entities that Require Certain Internal Confidentiality Agreements or Statements-Representation**

As prescribed in 3.909-3(a), insert the following provision: Prohibition on Contracting With Entities That Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

(a) Definition. Internal confidentiality agreement or statement, subcontract, and subcontractor, as used in this provision, are defined in the clause at 52.203-19, Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements.

(b) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use funds appropriated (or otherwise made available) for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements

prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.

(c) The prohibition in paragraph (b) of this provision does not contravene requirements applicable to Standard Form 312, (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.

(d) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

**(End of Provision)**

#### **FAR 52.222-38**

Feb 2016

#### **Compliance with Veterans' Employment Reporting Requirements**

As prescribed in 22.1310 (c), insert the following provision:

#### **COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS (Feb 2016)**

By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37, Employment Reports on Veterans), it has filed the most recent VETS-4212 Report required by that clause.

**(End of Provision)**

#### **FAR 52.222-56**

Oct 2020

#### **Certification Regarding Trafficking in Persons Compliance Plan**

As prescribed in 22.1705(b), insert the following provision:

#### **CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (Oct 2020)**

(a) The term "commercially available off-the-shelf (COTS) item," is defined in the clause of this solicitation entitled "Combating

Trafficking in Persons" (FAR clause 52.222-50).

(b) The apparent successful Offeror shall submit, prior to award, a certification, as specified in paragraph (c) of this provision, for the portion (if any) of the contract that-

- (1) Is for supplies, other than commercially available off-the-shelf items, to be acquired outside the United States, or services to be performed outside the United States; and
- (2) Has an estimated value that exceeds \$550,000.

(c) The certification shall state that-

- (1) It has implemented a compliance plan to prevent any prohibited activities identified in paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons, and to monitor, detect, and terminate the contract with a subcontractor engaging in prohibited activities identified at paragraph (b) of the clause at 52.222-50, Combating Trafficking in Persons; and
- (2) After having conducted due diligence, either-
  - (i) To the best of the Offeror's knowledge and belief, neither it nor any of its proposed agents, subcontractors, or their agents is engaged in any such activities; or
  - (ii) If abuses relating to any of the prohibited activities identified in 52.222-50(b) have been found, the Offeror or proposed subcontractor has taken the appropriate remedial and referral actions.

**(End of Provision)**

#### **FAR 52.223-1**

May 2012

#### **Biobased Product Certification**

(a) As required by the Farm Security and Rural Investment Act of 2002 and the Energy Policy Act of 2005 (7 U.S.C. 8102(c)(3)), the offeror certifies, by signing this offer, that biobased products (within categories of products listed by the United States Department of Agriculture in 7 CFR part 3201, subpart B) to be used or delivered in the performance of the contract, other than biobased products that are not purchased by the offeror as a direct result of this contract, will comply with the applicable specifications or other contractual requirements.

**(End of Provision)**

#### **FAR 52.225-20**

Aug 2009

#### **Prohibition on Conducting Restricted Business Operations in**

Page 20 of 66

**ED 003593**

### Sudan-Certification

(a) Definitions. As used in this provision-

"Business operations" means engaging in commerce in any form, including by acquiring, developing, maintaining, owning, selling, possessing, leasing, or operating equipment, facilities, personnel, products, services, personal property, real property, or any other apparatus of business or commerce.

"Marginalized populations of Sudan" means-

- (1) Adversely affected groups in regions authorized to receive assistance under section 8(c) of the Darfur Peace and Accountability Act (Pub. L. 109-344) (50 U.S.C. 1701 note); and
- (2) Marginalized areas in Northern Sudan described in section 4(9) of such Act.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007(Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional government of southern Sudan;
- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;
- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended

(b) Certification. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

**FAR 52.225-25**

Jun 2020

**Prohibition on Contracting with Entities Engaging in Certain Activities or Transactions Relating to Iran - Representation and Certifications**

(a) Definitions. As used in this provision-

"Person"

(1) Means-

- (i) A natural person;
- (ii) A corporation, business association, partnership, society, trust, financial institution, insurer, underwriter, guarantor, and any other business organization, any other nongovernmental entity, organization, or group, and any governmental entity operating as a business enterprise; and
- (iii) Any successor to any entity described in paragraph (1)(ii) of this definition; and

(2) Does not include a government or governmental entity that is not operating as a business enterprise.

"Sensitive technology"-

(1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-

- (i) To restrict the free flow of unbiased information in Iran; or
- (ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and

(2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

(b) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.

(c) Except as provided in paragraph (d) of this provision or if a waiver has been granted in accordance with 25.703-4, by submission of its offer, the offeror-

- (1) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the

government of Iran or any entities or individuals owned or controlled by, or acting on behalf of or at the direction of, the government of Iran;

(2) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act. These sanctioned activities are in the areas of development of the petroleum resources of Iran, production of refined petroleum products in Iran, sale and provision of refined petroleum products to Iran, and contributing to Iran's ability to acquire or develop certain weapons or technologies; and

(3) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>).

(d) Exception for trade agreements. The representation requirement of paragraph (c)(1) and the certification requirements of paragraphs (c)(2) and (c)(3) of this provision do not apply if-

- (1) This solicitation includes a trade agreements notice or certification (e.g., 52.225-4, 52.225-6, 52.225-12, 52.225-24, or comparable agency provision); and
- (2) The offeror has certified that all the offered products to be supplied are designated country end products or designated country construction material.

**(End of Provision)**

#### **FAR 52.227-6**

Apr 1984

#### **Royalty Information (Alternate I)**

(a) Cost or charges for royalties. When the response to this solicitation contains costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

- (1) Name and address of licensor.
- (2) Date of license agreement.
- (3) Patent numbers, patent application serial numbers, or

other basis on which the royalty is payable.

(4) Brief description, including any part or model numbers of each contract item or component on which the royalty is payable.

(5) Percentage or dollar rate of royalty per unit.

(6) Unit price of contract item.

(7) Number of units.

(8) Total dollar amount of royalties.

(b) Copies of current licenses. In addition, if specifically requested by the Contracting Officer before execution of the contract, the offeror shall furnish a copy of the current license agreement and an identification of applicable claims of specific patents.

### **ALTERNATE I (APR 1984)**

Substitute the following for the introductory portion of paragraph (a) of the basic clause: When the response to this solicitation covers charges for special construction or special assembly that contain costs or charges for royalties totaling more than \$250, the following information shall be included in the response relating to each separate item of royalty or license fee:

**(End of Provision)**

## **PROVISIONS POPULATED BASED ON REGISTRATION DATA**

### **FAR 52.203-2**

Apr 1985

### **Certificate of Independent Price Determination**

(a) The offeror certifies that-

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-

(i) Those prices;

(ii) The intention to submit an offer; or

(iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to

induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory-

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or

(2)

(i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision **Rose Dribber, Assistant Director, Sponsored Research Administration; Pam Ray, Director, Sponsored Research Administration; Stacey Patterson, Vice President for Research;**

(ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; and

(iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision.

(c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

**(End of Provision)**

#### **FAR 52.204-3**

Oct 1998

#### **Taxpayer Identification**

(a) Definitions

"Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.

"Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security

Number or an Employer Identification Number.

(b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the payment reporting requirements described in Federal Acquisition Regulation (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent reduction of payments otherwise due under the contract.

(c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.

(d) Taxpayer Identification Number (TIN).

\*  TIN on file.

\*  TIN has been applied for.

\* TIN is not required because:

\*  Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;

\*  Offeror is an agency or instrumentality of a foreign government;

\*  Offeror is an agency or instrumentality of the Federal Government.

(e) Type of organization.

\*  sole proprietorship;

\*  Partnership;

\*  Corporate entity (not tax-exempt);

\*  Corporate entity (tax-exempt);

\*  Government entity (Federal, State, or local);

\*  Foreign government;

\*  International organization per 26 CFR 1.6049-4;

\*  Other **Public Institution of Higher Education**

(f) Common parent.

\*  Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision. Name and TIN of common parent: Name: **(blank)**

TIN: **(blank)**

**(End of Provision)**

FAR 52.204-5

Oct 2014

**Women-Owned Business (Other Than Small Business)**

(a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.

(b) Representation. [Complete only if the offeror is a women-owned business concern and has not represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business Program Representations, of this solicitation.] The offeror represents that it  is a women-owned business concern.

**(End of Provision)**

FAR 52.204-17

Aug 2020

**Ownership or Control of Offeror**

(a) Definition. As used in this provision--

Commercial and Government Entity (CAGE) code means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or

(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or by the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

Highest-level owner means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

Immediate owner means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

(b) The Offeror represents that it **③ DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if

applicable, paragraph (d) of this provision for each participant in the joint venture.\*

(c) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **(blank)**

Immediate owner legal name: **(blank)**

(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity?  Yes  
 No

(d) If the Offeror indicates "yes" in paragraph (c) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code: **(blank)**

Highest-level owner legal name: **(blank)**

(Do not use a "doing business as" name)

**(End of Provision)**

## FAR 52.204-20

Aug 2020

### Predecessor of Offeror

(a) Definitions. As used in this provision--

"Commercial and Government Entity (CAGE) code" means--

(1) An identifier assigned to entities located in the United States or its outlying areas by the Defense Logistics Agency (DLA) Commercial and Government Entity (CAGE) Branch to identify a commercial or government entity by unique location; or

(2) An identifier assigned by a member of the North Atlantic Treaty Organization (NATO) or the NATO Support and Procurement Agency (NSPA) to entities located outside the United States and its outlying areas that the DLA Commercial and Government Entity (CAGE) Branch records and maintains in the CAGE master file. This type of code is known as a NATO CAGE (NCAGE) code.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary,

depending on State law and specific circumstances.

(b) The Offeror represents that it ~~IS~~ **IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.

(c) If the Offeror has indicated "is" in paragraph (b) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years (if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: **(blank)**

(or mark "Unknown").

Predecessor legal name: **(blank)**

(Do not use a "doing business as" name)

**(End of Provision)**

#### FAR 52.204-26

Oct 2020

#### Covered Telecommunications Equipment or Services - Representation

(a) Definitions. As used in this provision, "covered telecommunications equipment or services" and "reasonable inquiry" have the meaning provided in the clause at 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for "covered telecommunications equipment or services."

(c)

(1) Representation. The Offeror represents that it ~~DOES~~ **DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it ~~DOES~~ **DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

**(End of Provision)**

#### FAR 52.209-2

Nov 2015

#### Prohibition on Contracting with Inverted Domestic Corporations- Representation

(a) Definitions. "Inverted domestic corporation" and "subsidiary" have the meaning given in the clause of this contract entitled Prohibition on Contracting with Inverted Domestic Corporations (52.209-10).

(b) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.

(c) Representation. the offeror represents that-

- (1) It  **IS NOT** an inverted domestic corporation; and
- (2) It  **IS NOT** a subsidiary of an inverted domestic corporation.

**(End of Provision)**

## FAR 52.209-5

Aug 2020

### Certification Regarding Responsibility Matters

(a)

(1) The Offeror certifies, to the best of its knowledge and belief, that-

(i) The Offeror and/or any of its Principals-

(A)  **ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B)  **HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) contract or subcontract; violation of Federal or State antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property(if offeror checks "have", the offeror shall also see 52.209-7, if included in this solicitation);

(C)  **ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of

the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.

(D) ~~•~~ **HAVE NOT**, within a three-year period preceding this offer, been notified of any delinquent Federal Taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.

(1) Federal taxes are considered delinquent if both of the following criteria apply:

(i) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.

(ii) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(2) Examples:

(i) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(ii) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C. 6320 entitling the

taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(iii) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

(iv) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U.S.C 362 (the Bankruptcy Code).

(ii) The Offeror, ~~☒ HAS NOT~~, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

(2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a division or business segment; and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

(b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror

learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility.

Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

**(End of Provision)**

**FAR 52.209-11**

Feb 2016

**Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law**

(a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-

(1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

(2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation

and made a determination that this action is not necessary to protect the interests of the Government.

(b) The Offeror represents that-

- (1) It  **IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and
- (2) It  **IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

**(End of Provision)**

**FAR 52.212-3**

Dec 2022

### **Offeror Representations and Certifications - Commercial Products and Commercial Se**

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.212-3(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.212-3(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

The Offeror shall complete only paragraph (b) of this provision if the Offeror has completed the annual representations and certifications electronically in the System for Award Management (SAM) accessed through <https://www.sam.gov>. If the Offeror has not completed the annual representations and certifications electronically, the Offeror shall complete only paragraphs (c) through (v) of this provision.

(a) Definitions. As used in this provision-

"Covered telecommunications equipment or services" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Economically disadvantaged women-owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127 and 13 CFR part 127, and the concern is certified by SBA or an approved third-party certifier in accordance with 13 CFR 127.300. It automatically qualifies as a women-owned small business eligible under the WOSB Program.

"Forced or indentured child labor" means all work or service-

(1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or

(2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

"Highest-level owner" means the entity that owns or controls an immediate owner of the offeror, or that owns or controls one or more entities that control an immediate owner of the offeror. No entity owns or exercises control of the highest level owner.

"Immediate owner" means an entity, other than the offeror, that has direct control of the offeror. Indicators of control include, but are not limited to, one or more of the following: ownership or interlocking management, identity of interests among family members, shared facilities and equipment, and the common use of employees.

"Inverted domestic corporation", means a foreign incorporated entity that meets the definition of an inverted domestic corporation under 6 U.S.C. 395(b), applied in accordance with the rules and definitions of 6 U.S.C. 395(c).

"Manufactured end product" means any end product in product and service codes (PSCs) 1000-9999, except-

- (1) PSC 5510, Lumber and Related Basic Wood Materials;
- (2) Product or Service Group (PSG) 87, Agricultural Supplies;
- (3) PSG 88, Live Animals;
- (4) PSG 89, Subsistence;
- (5) PSC 9410, Crude Grades of Plant Materials;
- (6) PSC 9430, Miscellaneous Crude Animal Products, Inedible;
- (7) PSC 9440, Miscellaneous Crude Agricultural and Forestry Products;
- (8) PSC 9610, Ores;
- (9) PSC 9620, Minerals, Natural and Synthetic; and
- (10) PSC 9630, Additive Metal Materials.

"Place of manufacture" means the place where an end product is assembled out of components, or otherwise made or processed from raw materials into the finished product that is to be provided to the Government. If a product is disassembled and reassembled, the place of reassembly is not the place of manufacture.

"Predecessor" means an entity that is replaced by a successor and includes any predecessors of the predecessor.

"Reasonable inquiry" has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

"Restricted business operations" means business operations in Sudan that include power production activities, mineral extraction activities, oil-related activities, or the production of military equipment, as those terms are defined in the Sudan Accountability and Divestment Act of 2007 (Pub. L. 110-174). Restricted business operations do not include business operations that the person (as that term is defined in Section 2 of the Sudan Accountability and Divestment Act of 2007) conducting the business can demonstrate-

- (1) Are conducted under contract directly and exclusively with the regional

government of southern Sudan;

- (2) Are conducted pursuant to specific authorization from the Office of Foreign Assets Control in the Department of the Treasury, or are expressly exempted under Federal law from the requirement to be conducted under such authorization;
- (3) Consist of providing goods or services to marginalized populations of Sudan;
- (4) Consist of providing goods or services to an internationally recognized peacekeeping force or humanitarian organization;
- (5) Consist of providing goods or services that are used only to promote health or education; or
- (6) Have been voluntarily suspended.

"Sensitive technology"-

- (1) Means hardware, software, telecommunications equipment, or any other technology that is to be used specifically-
  - (i) To restrict the free flow of unbiased information in Iran; or
  - (ii) To disrupt, monitor, or otherwise restrict speech of the people of Iran; and
- (2) Does not include information or informational materials the export of which the President does not have the authority to regulate or prohibit pursuant to section 203(b)(3) of the International Emergency Economic Powers Act (50 U.S.C. 1702(b)(3)).

"Service - disabled veteran - owned small business concern"

- (1) Means a small business concern-
  - (i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and
  - (ii) The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.
- (2) Service-disabled veteran means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

- (1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in its field of operation, and qualified as a small business under the criteria in 13 CFR part 121 and size standards in this solicitation.
- (2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern", consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that-

- (1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-
  - (i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States; and
  - (ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
- (2) The management and daily business operations of which are controlled (as defined at 13 CFR 124.106) by individuals, who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Subsidiary" means an entity in which more than 50 percent of the entity is owned

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation.

"Successor" means an entity that has replaced a predecessor by acquiring the assets and carrying out the affairs of the predecessor under a new name (often through acquisition or merger). The term "successor" does not include new offices/divisions of the same company or a company that only changes its name. The extent of the responsibility of the successor for the liabilities of the predecessor may vary, depending on State law and specific circumstances.

"Veteran-owned small business concern" means a small business concern

- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127), means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States, and the concern is certified by SBA or an approved third-party certifier in accordance with 13 CFR 127.300.

"Women-owned small business concern" means a small business concern-

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

(b)

(1) Annual Representations and Certifications. Any changes provided by the Offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications in SAM.

(2) The Offeror has completed the annual representations and certifications electronically in SAM accessed through <https://www.sam.gov>. After reviewing SAM information, the Offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications-Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), at the time this offer is submitted and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs \_\_\_\_\_.

[Offeror to identify the applicable paragraphs at (c) through (v) of this provision that the offeror has completed for the purposes of this solicitation only, if any.

These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on SAM.]

(c) Offerors must complete the following representations when the resulting contract is for supplies to be delivered or services to be performed in the United States or its outlying areas, or when the contracting officer has applied part 19 in accordance with 19.000(b)(1)(ii). Check all that apply. If no NAICS table is displayed, this registrant may not be considered a small business.

(1) Small business concern. The offeror represents as part of its offer that-

(i) It  **IS NOT** a small business concern; or

(ii) It  **IS NOT** a small business joint venture that complies with the requirements of 13 CFR 121.103(h) and 13 CFR 125.8(a) and (b).

[The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.]

(2) Veteran-owned small business concern. [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that  is,  is not a veteran-owned small business concern.

(3) Service-disabled veteran-owned small business concern. [Complete only if the offeror represented itself as a veteran-owned small business concern in paragraph (c)(2) of this provision.] The offeror represents as part of its offer that-

(i) It  is,  is not a service-disabled veteran-owned small business concern; or

(ii) It  is,  is not a joint venture that complies with the requirements of 13 CFR 125.18(b)(1) and (2).

[The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.] Each service disabled veteran-owned small business concern participating in the joint venture shall provide representation of its service disabled veteran-owned small business concern status.

(4) Small disadvantaged business concern. [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, that it  is,  is not a small disadvantaged business concern as defined in 13 CFR 124.1002.

(5) Women-owned small business concern. [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents that it  is,  is not a women-owned small business concern.

(6) WOSB joint venture eligible under the WOSB Program. The offeror represents that it,  **IS NOT** a joint venture that complies with the requirements of 13 CFR 127.506(a) through (c). [The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_.]

(7) Economically disadvantaged women-owned small business (EDWOSB) joint venture. The offeror represents that it,  **IS NOT** a joint venture that complies with the requirements of 13 CFR 127.506(a) through (c).

[The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_.]

(8) Women-owned business concern (other than small business concern). [Complete only if the offeror is a women-owned business concern and did not represent itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents that it  is a women-owned business concern.

(9) Tie bid priority for labor surplus area concerns. If this is an invitation for bid, small business offerors may identify the labor surplus areas in which costs to be incurred on account of manufacturing or production (by offeror or first-tier subcontractors) amount to more than 50 percent of the contract price:

(10) HUBZone small business concern. [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer, that-

(i) It  is  is not a HUBZone small business concern listed, on the date of this representation, as having been certified by SBA as a HUBZone small business concern in the Dynamic Small Business Search and SAM, and will attempt to maintain an employment rate of HUBZone residents of 35 percent of its employees during performance of a HUBZone contract (see 13 CFR 126.200(e)(1)); and

(ii) It  is  is not a HUBZone joint venture that complies with the requirements of 13 CFR 126.616(a) through (c). [The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_.] Each HUBZone small business concern participating in the HUBZone joint venture shall provide representation of its HUBZone status.

(d) Representations required to implement provisions of Executive Order 11246-

(1) Previous contracts and compliance. The offeror represents that-

- (i) It  **HAS** participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation; and
- (ii) It  **HAS** filed all required compliance reports.

(2) Affirmative Action Compliance. The offeror represents that-

- (i) It  **HAS DEVELOPED AND HAS ON FILE**, It at each establishment, affirmative action programs required by rules and regulations of the Secretary of Labor (41 CFR parts 60-1 and 60-2), or

(ii) It  has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

(e) Certification Regarding Payments to Influence Federal Transactions (31 U.S.C. 1352). (Applies if the contract is expected to exceed \$150,000.) By submission of its offer, the offeror certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress in his or her behalf in connection with the award of any resultant contract. If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the offeror with respect to this contract, the offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The offeror need not represent regularly employed officers or employees of the offeror to whom payments of reasonable compensation were made.

(f) Buy American Certificate. (Applies only if the clause at Federal Acquisition Regulation (FAR) 52.225-1, Buy American-Supplies, is included in this solicitation.)

(1)

(i) The Offeror certifies that each end product and that each domestic end product listed in paragraph (f)(3) of this provision contains a critical component, except those listed in paragraph (f)(2) of this provision, is a domestic end product.

(ii) The Offeror shall list as foreign end products those end products manufactured in the United States that do not qualify as domestic end products. For those foreign end products that do not consist wholly or predominantly of iron or steel or a combination of both, the Offeror shall also indicate whether these foreign end products exceed 55 percent domestic content, except for those that are COTS items. If the percentage of the domestic content is unknown, select

(iii) The Offeror shall separately list the line item numbers of domestic end products that contain a critical component (see FAR 25.105).

(iv) The terms "commercially available off-the-shelf (COTS) item," "critical component," "domestic end product," "end product," "foreign end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Supplies."

(2) Foreign End Products: **(blank)**

[List as necessary]

(3) Domestic end products containing a critical component:

Line Item No. \_\_\_\_

[List as necessary]

(4) The Government will evaluate offers in accordance with the policies and procedures of FAR part 25.

(g)

(1) Buy American-Free Trade Agreements-Israeli Trade Act Certificate. (Applies only if the clause at FAR 52.225-3, Buy American-Free Trade Agreements-Israeli Trade Act, is included in this solicitation.)

(i)

(A) The Offeror certifies that each end product, except those listed in paragraph (g)(1)(ii) or (iii) of this provision, is a domestic end product and that each domestic end product listed in paragraph (g)(1)(iv) of this provision contains a critical component.

(B) The terms "Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end product," "commercially available off-the-shelf (COTS) item," "critical component," "domestic end product," "end product," "foreign end product," "Free Trade Agreement country," "Free Trade Agreement country end product," "Israeli end product," and "United States" are defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act."

(ii) The Offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act." "Free Trade Agreement Country End Products (Other than Bahrainian, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act":  
[List as necessary]

(iii) The Offeror shall list those supplies that are foreign end products (other than those listed in paragraph (g)(1)(ii) of this provision) as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-Israeli Trade Act." The Offeror shall list as other foreign end products those end products manufactured in the United States that do not qualify as domestic end products. For those foreign end products that do not consist wholly or predominantly of iron or steel or a combination of both, the Offeror shall also indicate whether these foreign end products exceed 55 percent domestic content, except for those that are COTS items. If the percentage of the domestic content is unknown, select

(iv) The Offeror shall list the line item numbers of domestic end products that contain a critical component (see FAR 25.105).

Line Item No. \_\_\_\_

[List as necessary]

(v) The Government will evaluate offers in accordance with the policies and procedures of FAR part 25.

(2) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate II. If Alternate II to the clause at FAR 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision:

(g)(1)(ii) The offeror certifies that the following supplies are Israeli end products as defined in the clause of this solicitation entitled

(3) Buy American-Free Trade Agreements-Israeli Trade Act Certificate, Alternate III. If Alternate III to the clause at 52.225-3 is included in this solicitation, substitute the following paragraph (g)(1)(ii) for paragraph (g)(1)(ii) of the basic provision: The offeror certifies that the following supplies are Free Trade Agreement country end products (other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian end products) or Israeli end products as defined in the clause of this solicitation entitled "Buy American-Free Trade Agreements-

Israeli Trade Act":

Free Trade Agreement Country End Products (Other than Bahrainian, Korean, Moroccan, Omani, Panamanian, or Peruvian End Products) or Israeli End Products: **(blank)**  
[List as necessary]

(4) Trade Agreements Certificate. (Applies only if the clause at FAR 52.225-5, Trade Agreements, is included in this solicitation.)

(i) The offeror certifies that each end product, except those listed in paragraph (g)(5)(ii) of this provision, is a U.S.-made or designated country end product, as defined in the clause of this solicitation entitled "Trade Agreements."

(ii) The offeror shall list as other end products those end products that are not U.S.-made or designated country end products.

Other End Products: **(blank)**

[List as necessary]

(iii) The Government will evaluate offers in accordance with the policies and procedures of FAR Part25. For line items covered by the WTO GPA, the Government will evaluate offers of U.S.-made or designated country end products without regard to the restrictions of the Buy American statute. The Government will consider for award only offers of U.S.-made or designated country end products unless the Contracting Officer determines that there are no offers for such products or that the offers for such products are insufficient to fulfill the requirements of the solicitation.

(h) Certification Regarding Responsibility Matters (Executive Order 12689). (Applies only if the contract value is expected to exceed the simplified acquisition threshold.) The offeror certifies, to the best of its knowledge and belief, that the offeror and/or any of its principals-

(1) **ARE NOT** presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(2) **HAVE NOT**, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, state or local government contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property;

(3) **ARE NOT** presently indicted for, or otherwise criminally or civilly charged by a Government entity with, commission of any of these offenses enumerated in paragraph (h)(2) of this clause; and

(4) **HAVE NOT** within a three-year period preceding this offer, been notified of any delinquent Federal taxes in an amount that exceeds the threshold at 9.104-5(a)(2) for which the liability remains unsatisfied.

(i) Taxes are considered delinquent if both of the following criteria apply:

(A) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have

been exhausted.

(B) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(ii) Examples:

(A) The taxpayer has received a statutory notice of deficiency, under I.R.C.6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court Review, this will not be a final tax liability under the taxpayer has exercised all judicial appeal rights.

(B) The IRS has filed a notice of Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C.6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the tax payer has exercised all judicial appeal rights.

(C) The taxpayer has entered into an installment agreement pursuant to I.R.C.6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

(D) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under II U. S. C 362 (the Bankruptcy Code).

(i) Certification Regarding Knowledge of Child Labor for Listed End Products (Executive Order 13126). [The Contracting Officer must list in paragraph (i)(1) any end products being acquired under this solicitation that are included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, unless excluded at 22.1503(b).]

(1) Listed end products.

Listed End Product	Listed Countries of Origin
Bamboo	Burma
Beans (green, soy, yellow)	Burma
Brazil Nuts/Chestnuts	Bolivia
Bricks	Afghanistan, Burma, Cambodia, China, India, Nepal, Pakistan

Listed End Product	Listed Countries of Origin
Carpets	Nepal, Pakistan
Cassiterite (tin ore)	Democratic Republic of the Congo
Cattle	South Sudan
Coal	Pakistan
Coca (stimulant plant)	Colombia
Cocoa	Cote d'Ivoire, Nigeria
Coffee	Cote d'Ivoire
Coltan	Democratic Republic of the Congo
Cotton	Benin, Burkina Faso, China, Tajikistan
Cottonseed (hybrid)	India
Diamonds	Sierra Leone
Dried Fish	Bangladesh
Electronics	China
Embellished Textiles	India, Nepal
Fish (Including Talapia)	Ghana
Garments	Argentina, India, Thailand, Vietnam
Gold	Burkina Faso, Democratic Republic of the Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma

Listed End Product	Listed Countries of Origin
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethiopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite (tungsten ore)	Democratic Republic of the Congo

(2) Certification. [If the Contracting Officer has identified end products and countries of origin in paragraph (i)(1) of this provision, then the offeror must certify to either (i)(2)(i) or (i)(2)(ii) by checking the appropriate block.]

(i)  The offeror will not supply any end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product.

(ii)  The offeror may supply an end product listed in paragraph (i)(1) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture any such end product furnished under this contract. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

(j) Place of Manufacture (Does not apply unless the solicitation is predominantly for the acquisition of manufactured end products.) For statistical purposes only, the offeror shall indicate whether the place of manufacture of the end products it expects to provide in response to this solicitation is predominantly-

FSC Code	In/Outside US

(1)  In the United States (Check this box if the total anticipated price of offered end products manufactured in the United States exceeds the total anticipated price of offered end products manufactured outside the United States); or

(2)  Outside the United States.

(k) Certificates regarding exemptions from the application of the Service Contract Labor Standards (Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services.) [The contracting officer is to check a box to indicate if paragraph (k)(1) or (k)(2) applies.]

(1) Maintenance, calibration, or repair of certain equipment as described in FAR 22.1003-4(c)(1). The offeror  **DOES NOT** certify that \_\_

(i) The items of equipment to be serviced under this contract are used regularly for other than Governmental purposes and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontract) in substantial quantities to the general public in the course of normal business operations;

(ii) The services will be furnished at prices which are, or are based on, established catalog or market prices (see FAR 22.1003-4(c)(2)(ii)) for the maintenance, calibration, or repair of such equipment; and

(iii) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract will be the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.

(2) Certain services as described in FAR 22.1003-4(d)(1). The offeror,  **DOES NOT** certify that \_\_

(i) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;

(ii) The contract services will be furnished at prices that are, or are based on, established catalog or market prices (see FAR 22.1003-4(d)(2)(iii));

(iii) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and

(iv) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract is the same as that used for these employees and equivalent employees servicing commercial customers.

(3) If paragraph (k)(1) or (k)(2) of this clause applies \_\_

(i) If the offeror does not certify to the conditions in paragraph (k)(1) or (k)(2) and the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation, the offeror shall notify the Contracting Officer as soon as possible; and

(ii) The Contracting Officer may not make an award to the offeror if the offeror fails to execute the certification in paragraph (k)(1) or (k)(2) of this clause or to contact the Contracting Officer as required in paragraph (k)(3)(i) of this clause.

(l) Taxpayer Identification Number (TIN) (26 U.S.C. 6109, 31 U.S.C. 7701). (Not applicable if the offeror is required to provide this information to SAM to be eligible for award.)

(1) All offerors must submit the information required in paragraphs (l)(3) through (l)(5) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the Internal Revenue Service (IRS).

(2) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.

(3) Taxpayer Identification Number (TIN).

\*  TIN on file.

\*  TIN has been applied for.

\* TIN is not required because:

\*  Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;

\*  Offeror is an agency or instrumentality of a foreign government;

\*  Offeror is an agency or instrumentality of the Federal Government.

(4) Type of organization.

\*  sole proprietorship;

\*  Partnership;

\*  Corporate entity (not tax-exempt);

\*  Corporate entity (tax-exempt);

\*  Government entity (Federal, State, or local);

\*  Foreign government;

\*  International organization per 26 CFR 1.6049-4;

\*  Other **Public Institution of Higher Education**

(5) Common parent.

\*  Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.

\*  Name: **(blank)**

TIN: **(blank)**

(m) Restricted business operations in Sudan. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

(n) Prohibition on Contracting with Inverted Domestic Corporations.

(1) Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with either an inverted domestic corporation, or a subsidiary of an inverted domestic corporation, unless the exception at 9.108-2(b) applies or the requirement is waived in accordance with the procedures at 9.108-4.

(2) Representation. the offeror represents that-

(i) It ~~IS NOT~~ an inverted domestic corporation; and

(ii) It ~~IS NOT~~ a subsidiary of an inverted domestic corporation.

(o) Prohibition on contracting with entities engaging in certain activities or transactions relating to Iran.

(1) The offeror shall e-mail questions concerning sensitive technology to the Department of State at CISADA106@state.gov.

(2) Representation and Certifications. Unless a waiver is granted or an exception applies as provided in paragraph (o)(3) of this provision, by submission of its offer, the offeror-

(i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf of or at the direction of, the government of Iran;

(ii) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act; and

(iii) Certifies that the offeror, and any person owned or controlled by the offeror, does not knowingly engage in any transaction that exceeds the threshold at FAR 25.703-2(a)(2) with Iran's Revolutionary Guard Corps or any of its officials, agents, or affiliates, the property and interests in property of which are blocked pursuant to the International Emergency Economic Powers Act (50 U.S.C. 1701 et seq.) (see OFAC's Specially Designated Nationals and Blocked Persons List at <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>).

(3) The representation and certification requirements of paragraph (o)(2) of this provision do not apply if-

(i) This solicitation includes a trade agreements certification (e.g., 52.212-3(g) or a comparable agency provision); and

(ii) The offeror has certified that all the offered products to be supplied are designated country end products.

(p) Ownership or Control of Offeror. (Applies in all solicitations when there is a requirement to be registered in SAM or a requirement to have a unique entity identifier in the solicitation.)

(1) The Offeror represents that it ~~DOES NOT~~ **DOES NOT** have an immediate owner. If the Offeror has more than one immediate owner (such as a joint venture), then the Offeror shall respond to paragraph (c) and if applicable, paragraph (d) of this provision for each participant in the joint venture.\*

(2) If the Offeror indicates "has" in paragraph (b) of this provision, enter the following information:

Immediate owner CAGE code: **(blank)**

Immediate owner legal name: **(blank)**

(Do not use a "doing business as" name)

Is the immediate owner owned or controlled by another entity?  Yes  No

(3) If the Offeror indicates "yes" in paragraph (p)(2) of this provision, indicating that the immediate owner is owned or controlled by another entity, then enter the following information:

Highest-level owner CAGE code:       

Highest-level owner legal name: **(blank)**

(Do not use a "doing business as" name)

(q) Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law.

(1) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L.113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that-

(i) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

(ii) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.

(2) The Offeror represents that-

(i) It  **IS NOT** a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(ii) It  **IS NOT** a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

(r) Predecessor of Offeror. (Applies in all solicitations that include the provision at 52.204-16, Commercial and Government Entity Code Reporting.)

(1) The Offeror represents that it  **IS NOT** a successor to a predecessor that held a Federal contract or grant within the last three years.

(2) If the Offeror has indicated "is" in paragraph (r)(1) of this provision, enter the following information for all predecessors that held a Federal contract or grant within the last three years(if more than one predecessor, list in reverse chronological order):

Predecessor CAGE Code: **(blank)**

(or mark "Unknown").

Predecessor legal name: **(blank)**

(Do not use a "doing business as" name)

(s) Reserved.

(t) Public Disclosure of Greenhouse Gas Emissions and Reduction Goals. Applies in all solicitations that require offerors to register in SAM (12.301(d)(1)).

(1) This representation shall be completed if the Offeror received \$7.5 million or more in contract awards in the prior Federal fiscal year. The representation is optional if the Offeror

received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.

(2) Representation. [Offeror to check applicable block(s) in paragraph (t)(2)(i) and (ii)].

(i) The Offeror (itself or through its immediate owner or highest-level owner)  **DOES** publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.

(ii) The Offeror (itself or through its immediate owner or highest-level owner)  **DOES** **NOT** publicly disclose a quantitative greenhouse gas emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

(iii) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.

(3) If the Offeror checked "does" in paragraphs (t)(2)(i) or (t)(2)(ii) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: **https://ghgdata.epa.gov/ghgp/service/facilityDetail/2022?id=1005785&ds=E&et=&popup=true (blank)**

(u)

(1) In accordance with section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions), Government agencies are not permitted to use appropriated (or otherwise made available) funds for contracts with an entity that requires employees or subcontractors of such entity seeking to report waste, fraud, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.

(2) The prohibition in paragraph (u)(1) of this provision does not contravene requirements applicable to Standard Form 312 (Classified Information Nondisclosure Agreement), Form 4414 (Sensitive Compartmented Information Nondisclosure Agreement), or any other form issued by a Federal department or agency governing the nondisclosure of classified information.

(3) Representation. By submission of its offer, the Offeror represents that it will not require its employees or subcontractors to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or subcontractors from lawfully reporting waste, fraud, or abuse related to the performance of a Government contract to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information (e.g., agency Office of the Inspector General).

(v) Covered Telecommunications Equipment or Services - Representation. Section 889(a)(1) and Section 889(a)(1)(B) of Public Law 115-232.

(1) The Offeror shall review the list of excluded parties in the System for Award Management

(SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".

(2) The Offeror represents that-

- (i) It  **DOES NOT** provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
- (ii) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it,  **DOES NOT** use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

### Alternate I (Oct 2014)

As prescribed in 12.301(b)(2), add the following paragraph (c)(11) to the basic provision:

(11) (Complete if the offeror has represented itself as disadvantaged in paragraph (c)(4) of this provision.)

- Black American.
- Hispanic American.
- Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians).
- Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru).
- Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, or Nepal).
- Individual/concern, other than one of the preceding.

**(End of Provision)**

### FAR 52.214-14

Apr 1985

### Place of Performance-Sealed Bidding

(a) The bidder, in the performance of any contract resulting from this solicitation,  **DOES NOT INTEND** [check applicable box] to use one or more plants or facilities located at a different address from the address of the bidder as indicated in this bid.

(b) If the bidder checks "intends" in paragraph (a) of this provision, it shall insert in the spaces provided below the required information:  
Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

**(End of Provision)**

### FAR 52.215-6

Oct 1997

### Place of Performance

(a) The offeror or respondent, in the performance of any contract resulting from this solicitation,  **DOES NOT INTEND** [check applicable block] to use one or more plants or facilities located at a different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.

(b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Name and Address of Owner and Operator of the Plant or Facility if Other than Bidder

**(End of Provision)**

## FAR 52.219-1

MAR 2023

### Small Business Program Representations

The NAICS Codes you selected on the Goods and Services page of this registration are listed in the table under 52.219-1(c). Those NAICS Codes for which you are identified as small serve to complete the small business concern representation in 52.219-1(c)(1).

You are certifying to your size status for all the NAICS codes in the table. Please review it carefully. The Y/N answers are located in the "Small Business?" column. A "Y" indicates "Small" and "N" indicates "Other than Small." This status is derived from the SBA's size standards based on the size metrics you entered.

(a) Definitions. As used in this provision-

"Economically disadvantaged women owned small business (EDWOSB) concern" means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States and who are economically disadvantaged in accordance with 13 CFR part 127, and the concern is certified by SBA or an approved third-party certifier in accordance with 13 CFR 127.300. It automatically qualifies as a women-owned small business concern eligible under the WOSB Program.

"Service-disabled veteran-owned small business concern"

(1) Means a small business concern-

(i) Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and

(ii) The management and daily business operations of which are controlled by one or

more service-disabled veterans or, in the case of a service-disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.

(2) "Service-disabled veteran" means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

"Small business concern"

(1) Means a concern, including its affiliates, that is independently owned and operated, not dominant in its field of operation, and qualified as a small business under the criteria in 13 CFR part 121 and the size standard in paragraph (b) of this provision.

(2) Affiliates as used in this definition, means business concerns, one of whom directly or indirectly controls or has the power to control the others, or a third party or parties control or have the power to control the others. In determining whether affiliation exists, consideration is given to all appropriate factors including common ownership, common management, and contractual relationships. SBA determines affiliation based on the factors set forth at 13 CFR 121.103.

"Small disadvantaged business concern," consistent with 13 CFR 124.1002, means a small business concern under the size standard applicable to the acquisition, that

(1) Is at least 51 percent unconditionally and directly owned (as defined at 13 CFR 124.105) by-

(i) One or more socially disadvantaged (as defined at 13 CFR 124.103) and economically disadvantaged (as defined at 13 CFR 124.104) individuals who are citizens of the United States, and

(ii) Each individual claiming economic disadvantage has a net worth not exceeding \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

(2) The management and daily business operations of which are controlled (as defined at 13 CFR 124.106) by individuals who meet the criteria in paragraphs (1)(i) and (ii) of this definition.

"Veteran-owned small business concern" means a small business concern-

(1) Not less than 51 percent of which is owned by one or

more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and

(2) The management and daily business operations of which are controlled by one or more veterans.

"Women-owned small business concern" means a small business concern-

(1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and

(2) Whose management and daily business operations are controlled by one or more women.

"Women-owned small business (WOSB) concern eligible under the WOSB Program" (in accordance with 13 CFR part 127) means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States, and the concern is certified by SBA or an approved third-party certifier in accordance with 13 CFR 127.300.

(b)

(1) The North American Industry Classification System (NAICS) code for this acquisition is See Note.\*

(2) The small business size standard is See Note.

(3) The small business size standard for a concern that submits an offer, other than on a construction or service acquisition, but proposes to furnish an end item that it did not itself manufacture, process, or produce (i.e., nonmanufacturer), is 500 employees, or 150 employees for information technology value-added resellers under NAICS code 541519, if the acquisition-

(i) Is set aside for small business and has a value above the simplified acquisition threshold;

(ii) Uses the HUBZone price evaluation preference regardless of dollar value, unless the offeror waives the price evaluation preference; or

(iii) Is an 8(a), HUBZone, service-disabled veteran-owned, economically disadvantaged women-owned, or women-owned small business set-aside or sole-source award regardless of dollar value.

## (c) Representations

If no NAICS table is displayed, this registrant may not be considered a small business.

(1) The offeror represents as part of its offer that-

- (i) It  **IS NOT** a small business concern; or
- (ii) It  **IS NOT** a small business joint venture that complies with the requirements of 13 CFR 121.103(h) and 13 CFR 125.8(a) and (b). [The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.]

(2) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, that it  is,  is not, a small disadvantaged business concern as defined in 13 CFR 124.1002.

(3) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it  is,  is not a women-owned small business concern. (See Below)

(4) Women-owned small business (WOSB) joint venture eligible under the WOSB Program. The offeror represents as part of its offer that it  **IS NOT** a joint venture that complies with the requirements of 13 CFR 127.506(a) through (c). [The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.]

(5) Economically disadvantaged women-owned small business (EDWOSB) joint venture. The offeror represents as part of its offer that it  **IS NOT** a joint venture that complies with the requirements of 13 CFR 127.506(a) through (c). [The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.]

(6) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents as part of its offer that it  is,  is not a veteran-owned small business concern.

(7) [Complete only if the offeror represented itself as a veteran-owned small business concern in paragraph (c)(6) of this provision.] The offeror represents as part of its offer that-

- (i) It  is,  is not a service-disabled veteran-owned small business concern; or
- (ii) It  is,  is not a service-disabled veteran-owned joint venture that complies with the requirements of 13 CFR 125.18(b)(1) and (2). [The offeror shall enter the name and unique entity identifier of each party to the

joint venture: \_\_\_\_\_.] Each service-disabled veteran-owned small business concern participating in the joint venture shall provide representation of its service-disabled veteran-owned small business concern status.

(8) [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, as part of its offer, that-

(i) It  is,  is not a HUBZone small business concern listed, on the date of this representation, as having been certified by SBA as a HUBZone small business concern in the Dynamic Small Business Search and SAM, and will attempt to maintain an employment rate of HUBZone residents of 35 percent of its employees during performance of a HUBZone contract (see 13 CFR 126.200(e)(1)); and

(ii) It  is,  is not a HUBZone joint venture that complies with the requirements of 13 CFR 126.616(a) through (c). [ The offeror shall enter the name and unique entity identifier of each party to the joint venture: \_\_\_\_\_.] Each HUBZone small business concern participating in the HUBZone joint venture shall provide representation of its HUBZone status.

(d) Notice. Under 15 U.S.C.645(d), any person who misrepresents a firm's status as a business concern that is small, HUBZone small, small disadvantaged, service-disabled veteran-owned small, economically disadvantaged women-owned small, or women-owned small eligible under the WOSB Program in order to obtain a contract to be awarded under the preference programs established pursuant to section 8, 9, 15, 31, and 36 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall-

- (1) Be punished by imposition of fine, imprisonment, or both;
- (2) Be subject to administrative remedies, including suspension and debarment; and
- (3) Be ineligible for participation in programs conducted under the authority of the Act.

### **Alternate I (Sept 2015)**

As prescribed in 19.309(a)(2), add the following paragraph (c)(9) to the basic provision:

(9) [Complete if offeror represented itself as disadvantaged in paragraph (c)(2) of this provision.] The offeror shall check the category in which its ownership falls:

- Black American.
- Hispanic American.

Native American (American Indians, Eskimos, Aleuts, or Native Hawaiians).

Asian-Pacific American (persons with origins from Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Japan, China, Taiwan, Laos, Cambodia (Kampuchea), Vietnam, Korea, The Philippines, Republic of Palau, Republic of the Marshall Islands, Federated States of Micronesia, the Commonwealth of the Northern Mariana Islands, Guam, Samoa, Macao, Hong Kong, Fiji, Tonga, Kiribati, Tuvalu, or Nauru).

Subcontinent Asian (Asian-Indian) American (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands, or Nepal).

Individual/concern, other than one of the preceding.

## Alternate II (MAR 2023)

As prescribed in 19.309(a)(3), substitute the following paragraphs (b) and (c)(1) for paragraphs (b) and (c)(1) of the basic provision:

(b)

(1) The North American Industry Classification System (NAICS) codes and corresponding size standards for this acquisition are as follows; the categories or portions these NAICS codes are assigned to are specified elsewhere in the solicitation:

NAICS Code	Size Standard

[Contracting Officer to insert NAICS codes and size standards].

(2) The small business size standard for a concern that submits an offer, other than on a construction or service acquisition, but proposes to furnish an end item that it did not itself manufacture, process, or produce (i.e., nonmanufacturer), is 500 employees, or 150 employees for information technology value-added resellers under NAICS code 541519, if the acquisition-

- (i) Is set aside for small business and has a value above the simplified acquisition threshold;
- (ii) Uses the HUBZone price evaluation preference regardless of dollar value, unless the offeror waives the price evaluation preference; or
- (iii) Is an 8(a), HUBZone, service-disabled veteran-owned, economically disadvantaged women-owned, or women-owned small business set-aside or sole-source award regardless of dollar value.

(c) Representations.

(1) The Offeror shall represent its small business size status for each one of the NAICS codes assigned to this acquisition under which it is submitting an offer.

NAICS Code	Small Business Concern (Yes/No)

[Contracting Officer to insert NAICS codes.]

**FAR 52.219-2**

Oct 1995

**Equal Low Bids**

- (a) This provision applies to small business concerns only
- (b) The bidder's status as a labor surplus area (LSA) concern may affect entitlement to award in case of tie bids. If the bidder wishes to be considered for this priority, the bidder must identify, in the following space, the LSA in which the costs to be incurred on account of manufacturing or production (by the bidder or the first-tier subcontractors) amount to more than 50 percent of the contract price.
- (c) Failure to identify the labor surplus areas as specified in paragraph (b) of this provision will preclude the bidder from receiving priority consideration. If the bidder is awarded a contract as a result of receiving priority consideration under this provision and would not have otherwise received award, the bidder shall perform the contract or cause the contract to be performed in accordance with the obligations of an LSA concern.

**(End of Provision)****FAR 52.222-18**

Feb 2021

**Certification Regarding Knowledge of Child Labor for Listed End Products**

- (a) Definition:

"Forced or indentured child labor" means all work or service-

- (1) Exacted from any person under the age of 18 under the menace of any penalty for its nonperformance and for which the worker does not offer himself voluntarily; or
- (2) Performed by any person under the age of 18 pursuant to a contract the enforcement of which can be accomplished by process or penalties.

- (b) Listed end products. The following end product(s) being acquired under this solicitation is (are) included in the List of Products Requiring Contractor Certification as to Forced or Indentured Child Labor, identified by their country of origin. There is a reasonable basis to believe that listed end products from the listed countries of origin may have been mined, produced, or manufactured by forced or indentured child labor.

Listed End Product	Listed Countries of Origin
Bamboo	Burma
Beans (green, soy, yellow)	Burma
Brazil	Bolivia
Nuts/Chestnuts	
Bricks	Afghanistan, Burma, Cambodia, China, India, Nepal, Pakistan
Carpets	Nepal, Pakistan
Cassiterite (tin ore)	Democratic Republic of the Congo
Cattle	South Sudan
Coal	Pakistan
Coca (stimulant plant)	Colombia
Cocoa	Cote d'Ivoire, Nigeria
Coffee	Cote d'Ivoire
Coltan	Democratic Republic of the Congo
Cotton	Benin, Burkina Faso, China, Tajikistan
Cottonseed (hybrid)	India
Diamonds	Sierra Leone
Dried Fish	Bangladesh
Electronics	China
Embellished Textiles	India, Nepal
Fish (Including Talapia)	Ghana
Garments	Argentina, India, Thailand, Vietnam

Listed End Product	Listed Countries of Origin
Gold	Burkina Faso, Democratic Republic of the Congo
Granite	Nigeria
Gravel (crushed stones)	Nigeria
Pornography	Russia
Rice	Burma, India, Mali
Rubber	Burma
Shrimp	Thailand
Stones	India, Nepal
Sugarcane	Bolivia, Burma
Teak	Burma
Textiles (hand-woven)	Ethiopia
Tilapia (fish)	Ghana
Tobacco	Malawi
Toys	China
Wolframite (tungsten ore)	Democratic Republic of the Congo

(c) Certification. The Government will not make award to an offeror unless the offeror, by checking the appropriate block, certifies to either paragraph (c)(1) or paragraph (c)(2) of this provision

(1)  The offeror will not supply any end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in a corresponding country as listed for that end product.

(2)  The offeror may supply an end product listed in paragraph (b) of this provision that was mined, produced, or manufactured in the corresponding country as listed for that product. The offeror certifies that it has made a good faith

effort to determine whether forced or indentured child labor was used to mine, produce, or manufacture such end product. On the basis of those efforts, the offeror certifies that it is not aware of any such use of child labor.

**(End of Provision)**

**FAR 52.222-22**

Feb 1999

**Previous Contracts and Compliance Reports**

The offeror represents that-

- (a) It  **HAS** participated in a previous contract or subcontract subject the Equal Opportunity clause of this solicitation;
- (b) It  **HAS** filed all required compliance reports; and
- (c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

**(End of Provision)**

**FAR 52.222-25**

Apr 1984

**Affirmative Action Compliance**

The offeror represents that-

- (a) It  **HAS DEVELOPED AND HAS ON FILE**, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2); or
- (b) It  has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

**(End of Provision)**

**FAR 52.222-48**

May 2014

**Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Certification**

- (a) The offeror shall check the following certification:

Certification

The offeror  **DOES NOT CERTIFY** that -

- (1) The items of equipment to be serviced under this contract are used regularly for other than Government purposes, and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontractor) in substantial quantities to the general public in the course of normal business operations;

(2) The services will be furnished at prices which are, or are based on, established catalog or market prices for the maintenance, calibration, or repair of equipment.

(i) An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public.

(ii) An "established market price" is a current price, established in the usual course of trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror; and

(3) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract are the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.

(b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(c)(3) that the Service Contract Labor Standards statute-

(1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or

(2) Will apply to this offeror, then the clause at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, in this solicitation will not be included in any resultant contract awarded to this offeror, and the offeror may be provided an opportunity to submit a new offer on that basis.

(c) If the offeror does not certify to the conditions in paragraph (a) of this provision-

(1) The clause in this solicitation at 52.222-51, Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements, will not be included in any resultant contract awarded to this offeror; and

(2) The offeror shall notify the Contracting Officer as soon as

possible, if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

**(End of Provision)**

**FAR 52.222-52**

May 2014

**Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Certification**

(a) The offeror shall check the following certification:  
Certification

The offeror  **DOES NOT** certify that -

(1) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;

(2) The contract services are furnished at prices that are, or are based on, established catalog or market prices. An "established catalog price" is a price included in a catalog, price list, schedule, or other form that is regularly maintained by the manufacturer or the offeror, is either published or otherwise available for inspection by customers, and states prices at which sales currently, or were last, made to a significant number of buyers constituting the general public. An "established market price" is a current price, established in the usual course of ordinary and usual trade between buyers and sellers free to bargain, which can be substantiated from sources independent of the manufacturer or offeror;

(3) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and

(4) The offeror uses the same compensation (wage and fringe benefits) plan for all service employees performing work under the contract as the offeror uses for these employees and for equivalent employees servicing commercial customers.

(b) Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its

subcontractor if it subcontracts out the exempt services. If the offeror certifies to the conditions in paragraph (a) of this provision, and the Contracting Officer determines in accordance with FAR 22.1003-4(d)(3) that the Service Contract Labor Standards statute-

- (1) Will not apply to this offeror, then the Service Contract Labor Standards clause in this solicitation will not be included in any resultant contract to this offeror; or
- (2) Will apply to this offeror, then the clause at FAR 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, in this solicitation will not be included in any resultant contract awarded to this offer, and the offeror may be provided an opportunity to submit a new offer on that basis.

(c) If the offeror does not certify to the conditions in paragraph (a) of this provision-

- (1) The clause of this solicitation at 52.222-53, Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements, will not be included in any resultant contract to this offeror; and
- (2) The offeror shall notify the Contracting Officer as soon as possible if the Contracting Officer did not attach a Service Contract Labor Standards wage determination to the solicitation.

(d) The Contracting Officer may not make an award to the offeror, if the offeror fails to execute the certification in paragraph (a) of this provision or to contact the Contracting Officer as required in paragraph (c) of this provision.

**(End of Provision)**

**FAR 52.223-4**

May 2008

**Recovered Material Certification**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

**(End of Provision)**

**FAR 52.223-9**

May 2008

**Estimate of Percentage of Recovered Material Content for EPA-Designated Items (Alternate I)**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

**FAR 52.223-22**

Dec 2016

**Public Disclosure of Greenhouse Gas Emissions and Reduction Goals-Representation**

As prescribed in 23.804(b), insert the following provision:

Public Disclosure of Greenhouse Gas Emissions and Reduction Goals- Representation (Dec 2016)

(a) This representation shall be completed if the Offeror received \$7.5 million or more in Federal contract awards in the prior Federal fiscal year. The representation is optional if the Offeror received less than \$7.5 million in Federal contract awards in the prior Federal fiscal year.

(b) Representation [Offeror is to check applicable blocks in paragraphs (b)(1) and (2).]

(1) The Offeror (itself or through its immediate owner or highest-level owner)  **DOES**, publicly disclose greenhouse gas emissions, i.e., makes available on a publicly accessible Web site the results of a greenhouse gas inventory, performed in accordance with an accounting standard with publicly available and consistently applied criteria, such as the Greenhouse Gas Protocol Corporate Standard.

(2) The Offeror (itself or through its immediate owner or highest-level owner),  **DOES NOT** publicly disclose a quantitative greenhouse emissions reduction goal, i.e., make available on a publicly accessible Web site a target to reduce absolute emissions or emissions intensity by a specific quantity or percentage.

(3) A publicly accessible Web site includes the Offeror's own Web site or a recognized, third-party greenhouse gas emissions reporting program.

(c) If the Offeror checked "does" in paragraphs (b)(1) or (b)(2) of this provision, respectively, the Offeror shall provide the publicly accessible Web site(s) where greenhouse gas emissions and/or reduction goals are reported: **https://ghgdata.epa.gov/ghgp/service/facilityDetail/2022?id=1005785&ds=E&et=&popup=true (blank)**

(End of Provision)

**FAR 52.225-2**

OCT 2022

**Buy American Certificate**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)

**FAR 52.225-4**

OCT 2022

**Buy American-Free Trade Agreements-Israeli Trade Act Certificate**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

(End of Provision)  
Page 65 of 66

**ED 003638**

**FAR 52.225-6**

Feb 2021

**Trade Agreements Certificate**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

**(End of Provision)**

**FAR 52.226-2**

Oct 2014

**Historically Black College or University and Minority Institution Representation**

(a) Definitions. As used in this provision-

"Historically black college or university" means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2.

"Minority institution" means an institution of higher education meeting the requirements of Section 365(3) of the Higher Education Act of 1965 (20 U.S.C. 1067k), including a Hispanic-serving institution of higher education, as defined in Section 502(a) of the Act (20 U.S.C. 1101a).

(b) Representation. The offeror represents that it-

- IS NOT** a historically black college or university;
- IS NOT** a minority institution.

**(End of Provision)**

**FAR 52.227-15**

Dec 2007

**Representation of Limited Rights Data and Restricted Computer Software**

FLORIDA STATE UNIVERSITY has elected not to complete this provision. Information pertaining to this provision, must be submitted to the Government with individual offers/proposals.

**(End of Provision)**

## **SAM.gov Entity Detailed Report**

**07/11/2024 13:15:38 (UTC-05:00) Eastern Time (US & Canada)**

**Active Exclusions: NONE**

### **ENTITY GENERAL INFORMATION**

1. Entity Name: FLORIDA STATE UNIVERSITY
2. SAM Unique Entity ID: JF2BLNN4PJC3
3. CAGE: 3S772

### **BUSINESS INFORMATION**

1. Company Physical Address:  
874 TRADITIONS WAY  
TALLAHASSEE, FL  
32306-0001
2. Doing Business As:  
No information available
3. Division Name:  
SPONSORED RESEARCH ADMINISTRATION
4. Division Number:  
No information available
5. Congressional District:  
FL-02
6. State of Incorporation:  
FLORIDA

7. Country of Incorporation:

UNITED STATES

8. URL:

HTTP://WWW.RESEARCH.FSU.EDU

**ENTITY DATES**

1. Entity Start Date:

1851-01-01

2. Fiscal Year End Close Date:

06/30

**ENTITY TYPES**

1. Entity Structure:

Other

2. Entity Type:

Business or Organization

3. Profit Structure:

Non-Profit Organization

4. Purpose of Registration:

All Awards

5. Registration Status:

Active

6. Registration Expiration Date:

2024-11-06

**FINANCIAL INFORMATION**

1. Accepts Credit Card Payments:

No

2. Debt Subject to Offset:

No

**DISASTER RESPONSE**

1. Disaster Response:

No, this entity does not appear in the disaster response registry.

2. States:

No information available

3. Counties:

No information available

4. Metropolitan Statistical Areas:

No information available

**GOVERNMENT BUSINESS POC**

1. Name:

Esther Wheeler

2. Title:

No information available

3. US Phone:

8506448675

4. Non US Phone:

No information available

5. Fax:

8506441464

6. Email:

ejwheeler@fsu.edu

7. Address:

SPONSORED RESEARCH ADMINISTRATION

874 TRADITIONS WAY

TALLAHASSEE, FL 32306 USA

## SECTION 889

Sec 889 Results:

- (1) The Offeror represents that it DOES NOT provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.
- (2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it DOES NOT use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

## NAICS CODES

1. Primary NAICS Code:

611310

2. NAICS Codes:

NAICS Code	Description
541330	Engineering Services
541713	Research and Development in Nanotechnology
541714	Research and Development in Biotechnology (except Nanobiotechnology)
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)
541720	Research and Development in the Social Sciences and Humanities
611310	Colleges, Universities, and Professional Schools

## SAM.gov FAPIIS - Responsibility/Qualification Report

### ENTITY SUMMARY

UEI SAM	Cage Code	Legal Business Name	Physical Address
JF2BLNN4PJC3	3S772	FLORIDA STATE UNIVERSITY	874 TRADITIONS WAY  TALLAHASSEE, FL 32306-0001 USA

### PROCEEDINGS DATA

#### Proceedings Questions:

**Question 1:** Is there a Federal solicitation on which your business or organization, as represented by the UEI on this specific SAM record, is bidding that contains the FAR provision 52.209-7, or has your business or organization, as represented by the UEI on this specific SAM record, been awarded a Federal contract or assistance award that contains the award term and condition described in 2 C.F.R. 200 Appendix XII?

**Answer 1: YES**

**Question 2:** Does your business or organization, as represented by the UEI on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

**Answer 2: YES**

**Question 3:** Within the last five years, has the business or organization, as represented by the UEI on this specific SAM record, and/or any of its principles, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State: 1. Criminal proceeding resulting in a conviction or other acknowledgement of fault; 2. Civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgement of fault; and/or 3. Administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or another acknowledgement of fault?

**Answer 3: NO**

#### Proceedings Record Count:

0

**List of Proceedings:**

No information available.

**Proceedings POC:**

POC Name	POC Phone	POC Email	POC Address
Esther Wheeler	8506448675	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306 USA

**Alternate Proceedings POC:**

POC Name	POC Phone	POC Email	POC Address
Esther Wheeler	8506448675	ejwheeler@fsu.edu	SPONSORED RESEARCH ADMINISTRATION 874 TRADITIONS WAY TALLAHASSEE, FL 32306 USA

**RESPONSIBILITY INFORMATION****1. Responsibility Information Count:**

0

**2. Responsibility Information List:**

No information available.

**CORPORATE RELATIONSHIPS****1. Highest Owner:**

Legal Business Name	Cage Code	Integrity Records
No information available	No information available	N/A

**2. Immediate Owner:**

Legal Business Name	Cage Code	Integrity Records
No information available	No information available	N/A

**3. Predecessors List:**

Legal Business Name	Cage Code	Integrity Records
No information available	No information available	N/A

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>			1. CONTRACT ID CODE	PAGE OF PAGES
				1 36
2. AMENDMENT/MODIFICATION NUMBER  91990022C0014P00006	3. EFFECTIVE DATE  JUL 17, 2024	4. REQUISITION/PURCHASE REQUISITION NUMBER	5. PROJECT NUMBER <i>(If applicable)</i>	
6. ISSUED BY  US Department of Education 400 Maryland Avenue SW, LBJ-2C274 Washington DC 20202	CODE  CAMLBJ	7. ADMINISTERED BY <i>(If other than Item 6)</i>  See Block 6	CODE	
8. NAME AND ADDRESS OF CONTRACTOR <i>(Number, street, county, State and ZIP Code)</i>  FLORIDA STATE UNIVERSITY 874 TRADITIONS WAY TALLAHASSEE FL 32306			(X) 9A. AMENDMENT OF SOLICITATION NUMBER	
				9B. DATED <i>(SEE ITEM 11)</i>
			(X) 10A. MODIFICATION OF CONTRACT/ORDER NUMBER 91990022C0014	
			(X) 10B. DATED <i>(SEE ITEM 13)</i>	
CODE 00027876	FACILITY CODE	JAN 24, 2022		

**11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS**

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:  
 (a) By completing items 8 and 15, and returning \_\_\_\_\_ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)* Modification Amount: \$-50,000.00  
 See Schedule Modification Obligated Amount: \$-50,000.00

**13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14.**

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: <i>(Specify authority)</i> THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER IN ITEM 10A.  <input type="checkbox"/>
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES <i>(such as changes in paying office, appropriation data, etc.)</i> SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).  <input type="checkbox"/>
<input checked="" type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes Cost Reimbursement  <input type="checkbox"/>
	D. OTHER <i>(Specify type of modification and authority)</i>  <input type="checkbox"/>

**E. IMPORTANT:** Contractor  is not  is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

Please see attached.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER <i>(Type or print)</i>  Dr. Stacey Patterson, Vice President for Research	16A. NAME AND TITLE OF CONTRACTING OFFICER <i>(Type or print)</i>  Joseph Gibbs, contract specialist 202-453-7716 Joseph.Gibbs@ed.gov		
15B. CONTRACTOR/OFFEROR  Rose Driber for Stacey Patterson, VPR Date: 2024.07.23 08:52:12 -04'00'  <i>(Signature of person authorized to sign)</i>	15C. DATE SIGNED  7/23/24	16B. UNITED STATES OF AMERICA  <b>JOSEPH GIBBS</b> Digitally signed by JOSEPH GIBBS Date: 2024.07.23 09:43:43 -04'00'  <i>(Signature of Contracting Officer)</i>	16C. DATE SIGNED  JUL 17, 2024

The purpose of Modification P00006 for contract 91990022C0014 REL Southeast is the following:

- Incorporate a revised deliverable schedule dated 06/2024.
- De-obligate \$50,000.00 from CLIN 0008 (Regional Educational Laboratories (REL) Southeast Year 3 Funding (Non-Travel). This modification will be followed-up with Modification P00007 that adds \$50,000.00 to CLIN 0009 Regional Education Laboratories (REL) Southeast Year 3 Funding (Travel).
- The total contract value will be reduced by \$50,000.00 from \$27,803,000.00 to \$27,753,000.00. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$27,753,000 to \$27,803,000.00. In effect, after Modification P00007, the total contract value will remain the same at \$27,803,000.00.
- The total contract funding will be reduced by \$50,000.00 from \$18,317,916.96 to \$18,267,916.96. However, after Modification P00007 the total contract value will be increased by \$50,000.00 from \$18,267,916.96. to \$18,317,916.96. In effect, after Modification P00007, the total contract value will remain the same at \$18,317,916.96.

Except as provided herein, all other terms and conditions of contract 91990022C0014 remains unchanged and in full force and effect.

**Contractor's Statement of Release**

In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's Revised Delivery Schedule "proposal(s) for adjustment," the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable to such facts or circumstances giving rise to the "proposal(s) for adjustment".

## SCHEDULE Continued

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ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0008	<p>Contracting Officer: Joseph Gibbs, 202-453-7716, Joseph.Gibbs@ed.gov</p> <p>Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Nicassia Belton, 202-804-7474, Nicassia.Belton@ed.gov</p> <p>Property Administrator Point of Contact: None</p> <p>Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> <p>(Changed Line Item)</p> <p>Regional Educational Laboratories (REL) Southeast Year 3 CPFF Funding (Non-Travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117. 0000.000000 \$5,813,713.98</p> <p>Period of Performance: 01/24/2022 to 01/02/2027</p> <p>Pricing Option: Cost-Plus-Award-Fee</p>	1.00	SE	5,813,713.98	5,813,713.98

ED 003649

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**SECTION J**  
**LIST OF ATTACHMENTS**

## J.1 Deliverable Schedule

SCHEDULE OF DELIVERABLES							On-Time? ?
Deliverable #		Deliverable Name	Draft Date Due	Submitted	Approved	Final Date Due	
<b>TASK 1 - REL Management &amp; Reporting</b>							
1 . 1 . 1 . 1 . 1 . 1		Summary of REL Kickoff Meeting					
1 . 1 . 1 . 1 . 1 . 1 . 1		Summary of REL Kickoff Meeting	NA	NA	NA	2/21/22	
1 . 2 . 1 . 1 . 1 . 1 . 1		<b>Bimonthly call agendas</b>					
1 . 2 . 1 . 1 . 1 . 1 . 1		Year 1 February Call 1 Agenda	2/7/22	2/7/22	2/7/22	2/9/22	1
1 . 2 . 1 . 1 . 1 . 1 . 2		Year 1 February Call 2 Agenda	2/21/22	2/18/22	2/18/22	2/23/22	1
1 . 2 . 1 . 1 . 1 . 1 . 3		Year 1 March Call 1 Agenda	3/7/22	3/4/2022	3/7/2022	3/9/22	1
1 . 2 . 1 . 1 . 1 . 1 . 4		Year 1 March Call 2 Agenda	3/21/22	3/21/2022	3/21/2022	3/23/22	1
1 . 2 . 1 . 1 . 1 . 1 . 5		Year 1 April Call 1 Agenda	4/4/22	4/4/2022	4/6/2022	4/6/22	1
1 . 2 . 1 . 1 . 1 . 1 . 6		Year 1 April Call 2 Agenda	4/18/22	4/18/2022	4/18/2022	4/20/22	1
1 . 2 . 1 . 1 . 1 . 1 . 7		Year 1 May Call 1 Agenda	5/2/22	5/2/2022	5/2/2022	5/4/22	1
1 . 2 . 1 . 1 . 1 . 1 . 8		Year 1 May Call 2 Agenda	5/16/22	5/13/2022	5/13/2022	5/18/22	1
1 . 2 . 1 . 1 . 1 . 1 . 9		Year 1 June Call 1 Agenda	6/6/22	6/6/2022	6/7/2022	6/8/22	1
1 . 2 . 1 . 1 . 1 . 1 . 10		Year 1 June Call 2 Agenda	6/20/22	6/17/2022	6/17/2022	6/22/22	1
1 . 2 . 1 . 1 . 1 . 1 . 11		Year 1 July Call 1 Agenda	7/11/22	7/8/2022	7/11/2022	7/13/22	1
1 . 2 . 1 . 1 . 1 . 1 . 12		Year 1 July Call 2 Agenda	7/25/22	7/22/2022	7/22/2022	7/27/22	1
1 . 2 . 1 . 1 . 1 . 1 . 13		Year 1 August Call 1 Agenda	8/8/22	8/8/2022	8/8/2022	8/10/22	1
1 . 2 . 1 . 1 . 1 . 1 . 14		Year 1 August Call 2 Agenda	8/22/22	8/19/2022	8/22/2022	8/24/22	1
1 . 2 . 1 . 1 . 1 . 1 . 15		Year 1 September Call 1 Agenda	9/2/22	9/2/2022	9/2/2022	9/4/22	1
1 . 2 . 1 . 1 . 1 . 1 . 16		<b>Year 1 September Call 2 Agenda</b>	<u>9/19/22</u>			<u>9/21/22</u>	Call was cancelled.
1 . 2 . 1 . 1 . 1 . 1 . 17		Year 1 October Call 1 Agenda	10/3/22	10/3/2022	10/3/2022	10/5/22	1
1 . 2 . 1 . 1 . 1 . 1 . 18		Year 1 October Call 2 Agenda	10/17/22	10/16/2022	10/19/2022	10/19/22	1
1 . 2 . 1 . 1 . 1 . 1 . 19		Year 1 November Call 1 Agenda	10/31/22	10/31/2022		11/2/22	1
1 . 2 . 1 . 1 . 1 . 1 . 20		Year 1 November Call 2 Agenda	11/14/22	11/10/2022	11/14/2022	11/16/22	1
1 . 2 . 1 . 1 . 1 . 1 . 21		Year 1 December Call 1 Agenda	12/5/22	12/5/2022	12/5/2022	12/7/22	1
1 . 2 . 1 . 1 . 1 . 1 . 22		Year 1 December Call 2 Agenda	12/19/22	12/15/2022	12/30/2022	12/21/22	1
1 . 2 . 1 . 1 . 1 . 1 . 23		Year 2 January Call 1 Agenda	1/9/23	1/9/2023	1/9/2023	1/11/23	1
1 . 2 . 1 . 1 . 1 . 1 . 24		Year 2 January Call 2 Agenda	1/23/23	1/23/2023	1/23/2023	1/25/23	1
1 . 2 . 1 . 1 . 1 . 1 . 25		Year 2 February Call 1 Agenda	2/6/23	2/6/2023	2/7/2023	2/8/23	

1	2	1	26	Year 2 February Call 2 Agenda	2/20/23	2/17/2023	2/17/2023	2/22/23		1
1	2	1	27	Year 2 March Call 1 Agenda	3/6/23	3/6/2023	3/6/2023	3/8/23		1
1	2	1	28	Year 2 March Call 2 Agenda	3/20/23	3/17/2023	3/21/2023	3/22/23		1
1	2	1	29	Year 2 April Call 1 Agenda	4/3/23	4/3/2023	4/4/2023	4/5/23		1
1	2	1	30	Year 2 April Call 2 Agenda	4/17/23	4/14/2023	4/17/2023	4/19/23		1
1	2	1	31	Year 2 May Call 1 Agenda	5/1/23	5/1/2023	5/1/2023	5/3/23		1
1	2	1	32	Year 2 May Call 2 Agenda	5/15/23	5/12/2023	5/15/2023	5/17/23		1
1	2	1	33	Year 2 June Call 1 Agenda	6/5/23	6/2/2023	6/5/2023	6/7/23		1
1	2	1	34	Year 2 June Call 2 Agenda	6/19/23	6/16/2023	6/20/2023	6/21/23		1
1	2	1	35	Year 2 July Call 1 Agenda	7/10/23	7/7/2023	7/10/2023	7/12/23		1
1	2	1	36	Year 2 July Call 2 Agenda	7/24/23	7/21/2023	7/24/2023	7/26/23		1
1	2	1	37	Year 2 August Call 1 Agenda	8/7/23	8/4/2023	8/8/2023	8/9/23		1
1	2	1	38	Year 2 August Call 2 Agenda	8/21/23	8/18/2023	8/21/2023	8/23/23		1
1	2	1	39	Year 2 September Call 1 Agenda	9/4/23	9/5/2023	9/5/2023	9/6/23		0
1	2	1	40	Year 2 September Call 2 Agenda	9/18/23	9/15/2023	9/20/2023	9/20/23		1
1	2	1	41	Year 2 October Call 1 Agenda	10/2/23	9/29/2023	10/3/2023	10/4/23		1
1	2	1	42	Year 2 October Call 2 Agenda	10/16/23	10/13/2023	10/13/2023	10/18/23		1
1	2	1	43	Year 2 November Call 1 Agenda	10/30/23	10/27/2023	10/30/2023	11/1/23		1
1	2	1	44	Year 2 November Call 2 Agenda	11/13/23	11/7/2023	11/9/2023	11/15/23		1
1	2	1	45	Year 2 December Call 1 Agenda	12/4/23	12/1/2023	12/4/2023	12/6/23		1
1	2	1	46	Year 2 December Call 2 Agenda	12/18/23			12/20/23	Call cancelled	1
1	2	1	47	Year 3 January Call 1 Agenda	1/8/24	1/4/2024	1/5/2024	1/10/24		1
1	2	1	48	Year 3 January Call 2 Agenda	1/22/24	1/19/2024	1/22/2024	1/24/24		1
1	2	1	49	Year 3 February Call 1 Agenda	2/5/24	2/5/2024	2/5/2024	2/7/24		1
1	2	1	50	Year 3 February Call 2 Agenda	2/19/24	2/16/2024	2/20/2024	2/21/24		1
1	2	1	51	Year 3 March Call 1 Agenda	3/4/24	3/4/2024	3/5/2024	3/6/24		1
1	2	1	52	Year 3 March Call 2 Agenda	3/18/24	3/14/2024	3/14/2024	3/20/24		1
1	2	1	53	Year 3 April Call 1 Agenda	4/1/24	3/29/2024	4/9/2024	4/3/24		1
1	2	1	54	Year 3 April Call 2 Agenda	4/15/24	4/11/2024	4/12/2024	4/17/24		1
1	2	1	55	Year 3 May Call 1 Agenda	5/6/24	5/16/2024	5/20/2024	5/8/24		1
1	2	1	56	Year 3 May Call 2 Agenda	5/20/24			5/22/24	Cancelled	0

1	.	2	.	1	.	57		Year 3 June Call 1 Agenda	6/3/24	5/31/2024	5/31/2024	6/5/24		1
1	.	2	.	1	.	58		Year 3 June Call 2 Agenda	6/17/24			6/19/24		
1	.	2	.	1	.	59		Year 3 July Call 1 Agenda	7/8/24			7/10/24		
1	.	2	.	1	.	60		Year 3 July Call 2 Agenda	7/22/24			7/24/24		
1	.	2	.	1	.	61		Year 3 August Call 1 Agenda	8/5/24			8/7/24		
1	.	2	.	1	.	62		Year 3 August Call 2 Agenda	8/19/24			8/21/24		
1	.	2	.	1	.	63		Year 3 September Call 1 Agenda	9/2/24			9/4/24		
1	.	2	.	1	.	64		Year 3 September Call 2 Agenda	9/16/24			9/18/24		
1	.	2	.	1	.	65		Year 3 October Call 1 Agenda	10/7/24			10/9/24		
1	.	2	.	1	.	66		Year 3 October Call 2 Agenda	10/21/24			10/23/24		
1	.	2	.	1	.	67		Year 3 November Call 1 Agenda	11/5/24			11/7/24		
1	.	2	.	1	.	68		Year 3 November Call 2 Agenda	11/19/24			11/21/24		
1	.	2	.	1	.	69		Year 3 December Call 1 Agenda	12/2/24			12/4/24		
1	.	2	.	1	.	70		Year 3 December Call 2 Agenda	12/16/24			12/18/24		
<b>1</b>	<b>.</b>	<b>2</b>	<b>.</b>	<b>2</b>	<b>.</b>			<b>Bimonthly call memos</b>						
1	.	2	.	2	.	1		Year 1 February Call 1	2/16/22	2/11/2022	2/11/2022	2/23/22		1
1	.	2	.	2	.	2		Year 1 February Call 2	3/2/22	2/28/2022	3/2/2022	3/9/22		1
1	.	2	.	2	.	3		Year 1 March Call 1	3/16/22	3/15/2022	3/18/2022	3/23/22		1
1	.	2	.	2	.	4		Year 1 March Call 2	3/30/22	3/25/2022	4/1/2022	4/6/22		1
1	.	2	.	2	.	5		Year 1 April Call 1	4/13/22	4/11/2022	4/15/2022	4/20/22		1
1	.	2	.	2	.	6		Year 1 April Call 2	4/27/22	4/27/2022	4/29/2022	5/4/22		1
1	.	2	.	2	.	7		Year 1 May Call 1	5/11/22	5/6/2022	5/13/2022	5/18/22		1
1	.	2	.	2	.	8		Year 1 May Call 2	5/25/22	5/23/2022	5/26/2022	6/1/22		1
1	.	2	.	2	.	9		Year 1 June Call 1	6/15/22	6/14/2022	6/22/2022	6/22/22		1
1	.	2	.	2	.	10		Year 1 June Call 2	6/29/22	6/24/2022	6/30/2022	7/6/22		1
1	.	2	.	2	.	11		Year 1 July Call 1	7/20/22	7/20/2022	7/20/2022	7/27/22		1
1	.	2	.	2	.	12		Year 1 July Call 2	8/3/22	8/1/2022	8/3/2022	8/10/22		1
1	.	2	.	2	.	13		Year 1 August Call 1	8/17/22	8/17/2022	8/24/2022	8/24/22		1
1	.	2	.	2	.	14		Year 1 August Call 2	8/31/22	8/29/2022	8/31/2022	9/7/22		1
1	.	2	.	2	.	15		Year 1 September Call 1	9/14/22	9/12/2022	9/15/2022	9/21/22		1
1	.	2	.	2	.	16		Year 1 September Call 2	9/28/22			10/5/22	Call 1.2.2.16 was cancelled	1
1	.	2	.	2	.	17		Year 1 October Call 1	10/12/22	10/5/2022	10/14/2022	10/19/22		1
1	.	2	.	2	.	18		Year 1 October Call 2	10/26/22	10/21/2022	10/26/2022	11/2/22		1
1	.	2	.	2	.	19		Year 1 November Call 1	11/9/22	11/7/2022	11/16/2022	11/16/22		1
1	.	2	.	2	.	20		Year 1 November Call 2	11/23/22	11/18/2022	11/28/2022	11/30/22		1
1	.	2	.	2	.	21		Year 1 December Call 1	12/14/22	12/9/2022	12/20/2022	12/21/22		1
1	.	2	.	2	.	22		Year 1 December Call 2	12/23/22	12/16/2022	12/30/2022	12/30/22		1
1	.	2	.	2	.	23		Year 2 January Call 1	1/18/23	1/13/2023	1/23/2023	1/25/23		1
1	.	2	.	2	.	24		Year 2 January Call 2	2/1/23	1/30/2023	2/7/2023	2/8/23		1
1	.	2	.	2	.	25		Year 2 February Call 1	2/15/23	2/13/2023	2/21/2023	2/22/23		1
1	.	2	.	2	.	26		Year 2 February Call 2	3/1/23	3/1/2023	3/8/2023	3/8/23		1
1	.	2	.	2	.	27		Year 2 March Call 1	3/15/23	3/14/2023	3/28/2023	3/22/23		1
1	.	2	.	2	.	28		Year 2 March Call 2	3/29/23	3/27/2023	4/4/2023	4/5/23		1
1	.	2	.	2	.	29		Year 2 April Call 1	4/12/23	4/10/2023	4/17/2023	4/19/23		1
1	.	2	.	2	.	30		Year 2 April Call 2	4/26/23	4/21/2023	4/30/2023	5/3/23		1
1	.	2	.	2	.	31		Year 2 May Call 1	5/10/23	5/8/2023	5/16/2023	5/17/23		1

1	2	.	2	.	32		Year 2 May Call 2	5/24/23	5/22/2023	6/1/2023	5/31/23		1
1	2	.	2	.	33		Year 2 June Call 1	6/14/23	6/8/2023	6/14/2023	6/21/23		1
1	2	.	2	.	34		Year 2 June Call 2	6/28/23	6/23/2023	7/5/2023	7/5/23		1
1	2	.	2	.	35		Year 2 July Call 1	7/19/23	7/14/2023	7/19/2023	7/26/23		1
1	2	.	2	.	36		Year 2 July Call 2	8/2/23	7/31/2023	8/10/2023	8/9/23		1
1	2	.	2	.	37		Year 2 August Call 1	8/16/23	8/15/2023	8/18/2023	8/23/23		1
1	2	.	2	.	38		Year 2 August Call 2	8/30/23	8/29/2023	09/07/23	9/6/23		1
1	2	.	2	.	39		Year 2 September Call 1	9/13/23	9/8/2023	9/15/2023	9/20/23		1
1	2	.	2	.	40		Year 2 September Call 2	9/27/23	9/22/2023	10/2/2023	10/4/23		1
1	2	.	2	.	41		Year 2 October Call 1	10/11/23	10/10/2023	10/19/2023	10/18/23		1
1	2	.	2	.	42		Year 2 October Call 2	10/25/23			11/1/23	Didn't have this call because of GB.	1
1	2	.	2	.	43		Year 2 November Call 1	11/8/23	11/6/2023	11/13/2023	11/15/23		1
1	2	.	2	.	44		Year 2 November Call 2	11/22/23	11/20/2023	11/22/2023	12/6/23		1
1	2	.	2	.	45		Year 2 December Call 1	12/13/23	12/7/2023	12/14/2023	12/20/23		1
1	2	.	2	.	46		Year 2 December Call 2	12/22/23			12/29/23	Cancelled	1
1	2	.	2	.	47		Year 3 January Call 1	1/17/24	1/16/2024	1/22/2024	12/30/23		1
1	2	.	2	.	48		Year 3 January Call 2	1/31/24	1/29/2024	2/5/2024	12/31/23		1
1	2	.	2	.	49		Year 3 February Call 1	2/14/24	2/14/2024		1/1/24		1
1	2	.	2	.	50		Year 3 February Call 2	2/28/24	2/29/2024	3/6/2024	1/2/24		0
1	2	.	2	.	51		Year 3 March Call 1	3/13/24	3/22/2024	4/7/2024	3/20/24		0
1	2	.	2	.	52		Year 3 March Call 2	3/27/24	3/22/2024	4/7/2024	4/3/24		1
1	2	.	2	.	53		Year 3 April Call 1	4/10/24	4/5/2024	4/16/2024	4/17/24		1
1	2	.	2	.	54		Year 3 April Call 2	4/24/24	4/24/2024	5/1/2024	5/1/24		1
1	2	.	2	.	55		Year 3 May Call 1	5/15/24	5/16/2024	5/20/2024	5/22/24		0
1	2	.	2	.	56		Year 3 May Call 2	5/29/24			6/5/24	Cancelled	1
1	2	.	2	.	57		Year 3 June Call 1	6/12/24	6/11/2024		6/19/24		
1	2	.	2	.	58		Year 3 June Call 2	6/26/24			7/3/24		
1	2	.	2	.	59		Year 3 July Call 1	7/17/24			7/24/24		
1	2	.	2	.	60		Year 3 July Call 2	7/31/24			8/7/24		
1	2	.	2	.	61		Year 3 August Call 1	8/14/24			8/21/24		
1	2	.	2	.	62		Year 3 August Call 2	8/28/24			9/4/24		
1	2	.	2	.	63		Year 3 September Call 1	9/11/24			9/18/24		
1	2	.	2	.	64		Year 3 September Call 2	9/25/24			10/4/23		
1	2	.	2	.	65		Year 3 October Call 1	10/16/24			10/18/23		
1	2	.	2	.	66		Year 3 October Call 2	10/30/24			11/1/23		
1	2	.	2	.	67		Year 3 November Call 1	11/14/24			11/15/23		
1	2	.	2	.	68		Year 3 November Call 2	11/28/24			12/6/23		
1	2	.	2	.	69		Year 3 December Call 1	12/11/24			12/20/23		
1	2	.	2	.	70		Year 3 December Call 2	12/20/24			12/29/23		
1	2	.	2	.	71		<b>Department presentation briefing materials</b>						
1	2	.	2	.	72		Department presentation briefing materials - Year 3 first meeting	3 weeks before each meeting	12/15/2023	12/15/2023	1/3/24		1
1	2	.	2	.	73		Summary of department presentation - Year 3 first meeting	3 weeks before each meeting					
1	2	.	2	.	74		Summary of department presentation - Year 3 second meeting	3 weeks before each meeting					
1	2	.	2	.	75		Summary of department presentation - Year 3 second meeting	1 week after each meeting					
1	2	.	2	.	76		<b>Identify, establish, maintain and convene the Governing Board</b>						

1	.	5	.	1	.	1		Report of the Establishment of the Governing Board	5 weeks after award	2/24/2022	2/28/2022	2/28/2022	
1	.	5	.	2	.	1		Agenda and materials for Governing Board meeting - Year 1 Spring Governing Board meeting	2/11/22	2/11/2022	3/4/2022	3/4/2022	
1	.	5	.	3	.	1		Meeting minutes and action items - Year 1 Spring Governing Board meeting	3/21/22	3/21/2022	3/30/2022	4/4/2022	
1	.	5	.	2	.	2		Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	9/16/2022	9/29/2022		
1	.	5	.	3	.	2		Meeting minutes and action items - Year 1 Fall Governing Board meeting	10/24/22	10/21/2022	10/26/2022		
1	.	5	.	2	.	3		Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	4/3/2023	4/18/2023		
1	.	5	.	3	.	3		Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	5/3/2023	5/15/2023		
1	.	5	.	2	.	4		Agenda and materials for Governing Board meeting - Year 2 Fall Governing Board meeting	3 weeks before meeting	9/21/2023	9/26/2023		
1	.	5	.	3	.	4		Meeting minutes and action items - Year 2 Fall Governing Board meeting	2 weeks after meeting	10/26/2023	10/30/2023		
1	.	5	.	2	.	5		Agenda and materials for Governing Board meeting - Year 3 Spring Governing Board meeting	3 weeks before meeting	4/8/2024			
1	.	5	.	3	.	5		Meeting minutes and action items - Year 3 Spring Governing Board meeting	2 weeks after meeting	5/15/2024	5/23/2024		
1	.	5	.	2	.	6		Agenda and materials for Governing Board meeting - Year 3 Fall Governing Board meeting	3 weeks before meeting				
1	.	5	.	3	.	6		Meeting minutes and action items - Year 3 Fall Governing Board meeting	2 weeks after meeting				
<b>1</b>	.	<b>6</b>	.		.			<b>Bi-Annual Assessment of Progress Report</b>					
1	.	6	.	1	.	1		Memo: Bi-Annual Assessment of Progress	4/15/22	5/2/2022	5/11/2022	5/15/2022	
1	.	6	.	1	.	2		Bi-Annual Assessment of Progress Report	12/1/22	11/30/2022	1/4/2023	12/31/2022	
1	.	6	.	1	.	3		Bi-Annual Assessment of Progress Report	6/16/23	6/16/2023	7/7/2023	7/16/2023	Original due date was 06/01/2023. Approved by Janelle via email on 05/31/2023.
1	.	6	.	1	.	4		Bi-Annual Assessment of Progress Report	12/1/23	12/1/2023	3/25/2024	12/31/2023	

1  
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1	.	6	.	1	.	5		Bi-Annual Assessment of Progress Report	6/3/24	5/31/2024		7/3/2024			1
1	.	6	.	1	.	6		Bi-Annual Assessment of Progress Report	12/2/24			1/1/2025			
1	.	7						<b>Monthly Progress Report</b>							
1	.	7	.	1	.	1		Year 1 February Monthly Progress Report	3/15/22	3/11/2022	3/16/2022	3/29/2022			1
1	.	7	.	1	.	2		Year 1 March Monthly Progress Report	4/15/22	4/15/2022	4/18/2022	4/29/2022			1
1	.	7	.	1	.	3		Year 1 April Monthly Progress Report	5/16/22	5/13/2022	5/17/2022	5/30/2022			1
1	.	7	.	1	.	4		Year 1 May Monthly Progress Report	6/15/22	6/15/2022	6/21/2022	6/29/2022			1
1	.	7	.	1	.	5		Year 1 June Monthly Progress Report	7/18/22	7/18/2022	7/18/2022	8/1/2022			1
1	.	7	.	1	.	6		Year 1 July Monthly Progress Report	8/15/22	8/11/2022	8/22/2022	8/29/2022			1
1	.	7	.	1	.	7		Year 1 August Monthly Progress Report	9/16/22	9/16/2022	9/26/2022	9/30/2022			1
1	.	7	.	1	.	8		Year 1 September Monthly Progress Report	10/17/22	10/17/2022	10/20/2022	10/31/2022			1
1	.	7	.	1	.	9		Year 1 October Monthly Progress Report	11/15/22	11/16/2022	11/19/2022	11/29/2022			0
1	.	7	.	1	.	10		Year 1 November Monthly Progress Report	12/15/22	12/14/2022	1/31/2023	12/29/2022			1
1	.	7	.	1	.	11		Year 1 December Monthly Progress Report	1/16/23	1/17/2023	2/16/2023	1/30/2023			0
1	.	7	.	1	.	12		Year 2 January Monthly Progress Report	2/15/23	2/15/2023	2/23/2023	3/1/2023			1
1	.	7	.	1	.	13		Year 2 February Monthly Progress Report	3/15/23	3/13/2023	3/21/2023	3/29/2023			1
1	.	7	.	1	.	14		Year 2 March Monthly Progress Report	4/17/23	4/11/2023	4/14/2023	5/1/2023			1
1	.	7	.	1	.	15		Year 2 April Monthly Progress Report	5/15/23	5/11/2023	5/17/2023	5/29/2023			1
1	.	7	.	1	.	16		Year 2 May Monthly Progress Report	6/15/23	6/15/2023	6/22/2023	6/29/2023			1
1	.	7	.	1	.	17		Year 2 June Monthly Progress Report	7/18/23	7/13/2023	7/18/2023	8/1/2023			1
1	.	7	.	1	.	18		Year 2 July Monthly Progress Report	8/15/23	8/15/2023	8/18/2023	8/29/2023			1
1	.	7	.	1	.	19		Year 2 August Monthly Progress Report	9/15/23	9/14/2023	9/22/2023	9/29/2023			1
1	.	7	.	1	.	20		Year 2 September Monthly Progress Report	10/16/23	10/13/2023	10/20/2023	10/30/2023			1
1	.	7	.	1	.	21		Year 2 October Monthly Progress Report	11/15/23	11/14/2023	11/20/2023	11/29/2023			1
1	.	7	.	1	.	22		Year 2 November Monthly Progress Report	12/15/23	12/14/2023	12/20/2023	12/29/2023			1
1	.	7	.	1	.	23		Year 2 December Monthly Progress Report	1/17/24	1/16/2024	1/31/2024	1/31/2024			1
1	.	7	.	1	.	24		Year 3 January Monthly Progress Report	2/15/24	2/15/2024	3/13/2024	2/29/2024			1
1	.	7	.	1	.	25		Year 3 February Monthly Progress Report	3/15/24	3/14/2024	3/25/2024	3/29/2024			1
1	.	7	.	1	.	26		Year 3 March Monthly Progress Report	4/15/24	4/15/2024	4/23/2024	4/29/2024			1
1	.	7	.	1	.	27		Year 3 April Monthly Progress Report	5/15/24	5/15/2024	5/22/2024	5/29/2024			1
1	.	7	.	1	.	28		Year 3 May Monthly Progress Report	6/17/24			7/1/2024			1

1	.	7	.	1	.	29		Year 3 June Monthly Progress Report	7/16/24			7/30/2024		
1	.	7	.	1	.	30		Year 3 July Monthly Progress Report	8/15/24			8/29/2024		
1	.	7	.	1	.	31		Year 3 August Monthly Progress Report	9/17/24			10/1/2024		
1	.	7	.	1	.	32		Year 3 September Monthly Progress Report	10/15/24			10/29/2024		
1	.	7	.	1	.	33		Year 3 October Monthly Progress Report	11/15/24			11/29/2024		
1	.	7	.	1	.	34		Year 3 November Monthly Progress Report	12/16/24			12/30/2024		
1	.	7	.	1	.	35		Year 3 December Monthly Progress Report	1/16/25			1/30/2025		
<b>1</b>	<b>.</b>	<b>8</b>						<b>Performance reporting</b>						
1	.	8	.	1	.	1		Performance report 1	Upon request					
1	.	8	.	1	.	2		Performance report 2	Upon request					
1	.	8	.	1	.	3		Performance report 3	Upon request					
1	.	8	.	1	.	4		Performance report 4	Upon request					
1	.	8	.	1	.	5		Performance report 5	Upon request					
1	.	8	.	1	.	6		Performance report 6	Upon request					
1	.	8	.	1	.	7		Performance report 7	Upon request					
<b>1</b>	<b>.</b>	<b>9</b>						<b>Submission of security documents for low and moderate level clearances</b>						
1	.	9	.	1	.	1		Submission of security documents for low and moderate level clearances	As needed					
<b>1</b>	<b>.</b>	<b>10</b>						<b>REL evaluation materials</b>						
1	.	10	.	1	.	1		REL evaluation materials	TBD					
<b>TASK 2 - Coordination &amp; Collaboration</b>														
<b>2</b>	<b>.</b>	<b>1</b>						<b>Lead cross-REL coordination activities</b>						
2	.	1	.	1	.	1	.	a	Foundational Literacy Cross-REL working group agenda #1	2 weeks before meeting	5/6/2022	5/13/2022		1
2	.	1	.	2	.	1	.	a	Foundational Literacy Cross-REL working group memo #1	2 weeks after meeting	5/23/2022	5/25/2022		1
2	.	1	.	1	.	2	.	a	Foundational Literacy Cross-REL working group agenda #2	2 weeks before meeting	8/10/2022	8/10/2022		1
2	.	1	.	2	.	2	.	a	Foundational Literacy Cross-REL working group memo #2	2 weeks after meeting	8/26/2022	8/31/2022		1
2	.	1	.	1	.	3	.	a	Foundational Literacy Cross-REL working group agenda #3	2 weeks before meeting	10/16/2022	10/20/2022		1
2	.	1	.	2	.	3	.	a	Foundational Literacy Cross-REL working group memo #3	2 weeks after meeting	11/15/2022	11/19/2022		1
2	.	1	.	1	.	4	.	a	Foundational Literacy Cross-REL working group agenda #4	2 weeks before meeting	1/19/2023	1/23/2023		1
2	.	1	.	2	.	4	.	a	Foundational Literacy Cross-REL working group memo #4	2 weeks after meeting	2/14/2023	2/21/2023		1

2	1	1	5	a	Foundational Literacy Cross-REL working group agenda #5	2 weeks before meeting	4/21/2023	4/30/2023		
2	1	2	5	a	Foundational Literacy Cross-REL working group memo #5	2 weeks after meeting	5/19/2023	5/19/2023		
2	1	1	6	a	Foundational Literacy Cross-REL working group agenda #6	2 weeks before meeting	7/7/2023	7/10/2023		
2	1	2	6	a	Foundational Literacy Cross-REL working group memo #6	2 weeks after meeting	8/15/2023	08/18/20236		
2	1	1	7	a	Foundational Literacy Cross-REL working group agenda #7	2 weeks before meeting	10/20/2023	10/24/2023		
2	1	2	7	a	Foundational Literacy Cross-REL working group memo #7	2 weeks after meeting	11/13/2023	11/16/2023		
2	1	1	8	a	Foundational Literacy Cross-REL working group agenda #8	2 weeks before meeting	1/17/2024	1/23/2024		
2	1	2	8	a	Foundational Literacy Cross-REL working group memo #8	2 weeks after meeting	2/12/2024	2/20/2024		
2	1	1	9	a	Foundational Literacy Cross-REL working group agenda #9	2 weeks before meeting	4/24/2024	4/26/2024		
2	1	2	9	a	Foundational Literacy Cross-REL working group memo #9	2 weeks after meeting	5/13/2024	5/23/2024		
2	1	1	10	a	Foundational Literacy Cross-REL working group agenda #10	2 weeks before meeting				
2	1	2	10	a	Foundational Literacy Cross-REL working group memo #10	2 weeks after meeting				
2	1	1	11	a	Foundational Literacy Cross-REL working group agenda #11	2 weeks before meeting				
2	1	2	11	a	Foundational Literacy Cross-REL working group memo #11	2 weeks after meeting				
2	1	1	12	a	Foundational Literacy Cross-REL working group agenda #12	2 weeks before meeting				
2	1	2	12	a	Foundational Literacy Cross-REL working group agenda #12	2 weeks after meeting				
2	1	1	1	b	Toolkit Development Cross-REL working group agenda #1	2 weeks before meeting	5/5/2022	5/5/2022		
2	1	2	1	b	Toolkit Development Cross-REL working group memo #1	2 weeks after meeting	5/11/2022	5/16/2022		
2	1	1	2	b	Toolkit Development Cross-REL working group agenda #2	2 weeks before meeting	5/31/2022	5/31/2022		
2	1	2	2	b	Toolkit Development Cross-REL working group memo #2	2 weeks after meeting	6/16/2022	6/22/2022		

2	.	1	.	1	.	3	.	b	Toolkit Development Cross-REL working group agenda #3	2 weeks before meeting	7/18/2022	7/20/2022			
2	.	1	.	2	.	3	.	b	Toolkit Development Cross-REL working group memo #3	2 weeks after meeting	7/27/2022	7/28/2022			1
2	.	1	.	1	.	4	.	b	Toolkit Development Cross-REL working group agenda #4	2 weeks before meeting	8/9/2022	8/9/2022			1
2	.	1	.	2	.	4	.	b	Toolkit Development Cross-REL working group memo #4	2 weeks after meeting	8/24/2022	8/26/2022			1
2	.	1	.	1	.	5	.	b	Toolkit Development Cross-REL working group agenda #5	2 weeks before meeting	9/2/2022	9/7/2022			1
2	.	1	.	2	.	5	.	b	Toolkit Development Cross-REL working group memo #5	2 weeks after meeting	9/28/2022	10/12/2022			1
2	.	1	.	1	.	6	.	b	Toolkit Development Cross-REL working group agenda #6	2 weeks before meeting	10/16/2022	10/19/2022			1
2	.	1	.	2	.	6	.	b	Toolkit Development Cross-REL working group memo #6	2 weeks after meeting	10/26/2022	10/31/2022			1
2	.	1	.	1	.	7	.	b	Toolkit Development Cross-REL working group agenda #7	2 weeks before meeting	11/2/2022	11/8/2022			1
2	.	1	.	2	.	7	.	b	Toolkit Development Cross-REL working group memo #7	2 weeks after meeting	12/6/2022	12/15/2022			1
2	.	1	.	1	.	8	.	b	Toolkit Development Cross-REL working group agenda #8	2 weeks before meeting	12/13/2022	12/28/2022			1
2	.	1	.	2	.	8	.	b	Toolkit Development Cross-REL working group memo #8	2 weeks after meeting	1/12/2023	1/23/2023			1
2	.	1	.	1	.	9	.	b	Toolkit Development Cross-REL working group agenda #9	2 weeks before meeting	1/30/2023	2/3/2023			1
2	.	1	.	2	.	9	.	b	Toolkit Development Cross-REL working group memo #9	2 weeks after meeting	2/21/2023	3/2/2023			1
2	.	1	.	1	.	10	.	b	Toolkit Development Cross-REL working group agenda #10	2 weeks before meeting	3/3/2023	3/10/2023			1
2	.	1	.	2	.	10	.	b	Toolkit Development Cross-REL working group memo #10	2 weeks after meeting	3/21/2023	3/28/2023			1
2	.	1	.	1	.	11	.	b	Toolkit Development Cross-REL working group agenda #11	2 weeks before meeting	4/3/2023	4/4/2023			1
2	.	1	.	2	.	11	.	b	Toolkit Development Cross-REL working group memo #11	2 weeks after meeting	4/12/2023	4/18/2023			1
2	.	1	.	1	.	12	.	b	Toolkit Development Cross-REL working group agenda #12	2 weeks before meeting	5/31/2023	6/1/2023			1
2	.	1	.	2	.	12	.	b	Toolkit Development Cross-REL working group memo #12	2 weeks after meeting	6/14/2023	6/15/2023			1

2	1	1	13	b	Toolkit Development Cross-REL working group agenda #13	2 weeks before meeting	6/27/2023	7/7/2023		
2	1	2	13	b	Toolkit Development Cross-REL working group memo #13	2 weeks after meeting	7/12/2023	7/12/2023		
2	1	1	14	b	Toolkit Development Cross-REL working group agenda #14	2 weeks before meeting	7/31/2023	8/8/2023		
2	1	2	14	b	Toolkit Development Cross-REL working group memo #14	2 weeks after meeting	8/9/2023	8/11/2023		
2	1	1	15	b	Toolkit Development Cross-REL working group agenda #15	2 weeks before meeting	9/6/2023	9/6/2023		
2	1	2	15	b	Toolkit Development Cross-REL working group memo #15	2 weeks after meeting	9/13/2023	9/18/2023		
2	1	1	16	b	Toolkit Development Cross-REL working group agenda #16	2 weeks before meeting	10/3/2023	10/3/2023		
2	1	2	16	b	Toolkit Development Cross-REL working group memo #16	2 weeks after meeting	10/11/2023	10/19/2023		
2	1	1	17	b	Toolkit Development Cross-REL working group agenda #17	2 weeks before meeting	11/2/2023	11/3/2023		
2	1	2	17	b	Toolkit Development Cross-REL working group memo #17	2 weeks after meeting	11/17/2023	11/20/2023		
2	1	1	18	b	Toolkit Development Cross-REL working group agenda #18	2 weeks before meeting	11/27/2023	11/27/2023		
2	1	2	18	b	Toolkit Development Cross-REL working group memo #18	2 weeks after meeting	12/15/2023	1/3/2024		
2	1	1	19	b	Toolkit Development Cross-REL working group agenda #19	2 weeks before meeting	1/10/2024	1/11/2024		
2	1	2	19	b	Toolkit Development Cross-REL working group memo #19	2 weeks after meeting	1/18/2024	1/23/2024		
2	1	1	20	b	Toolkit Development Cross-REL working group agenda #20	2 weeks before meeting	3/8/2024	3/11/2024		
2	1	2	20	b	Toolkit Development Cross-REL working group memo #20	2 weeks after meeting	3/20/2024	4/7/2024		
2	1	1	21	b	Toolkit Development Cross-REL working group agenda #21	2 weeks before meeting	5/10/2024	5/10/2024		
2	1	2	21	b	Toolkit Development Cross-REL working group memo #21	2 weeks after meeting	5/22/2024	5/24/2024		
2	1	1	22	b	Toolkit Development Cross-REL working group agenda #22	2 weeks before meeting				
2	1	2	22	b	Toolkit Development Cross-REL working group memo #22	2 weeks after meeting				

2	.	1	.	1	.	23	.	b	Toolkit Development Cross-REL working group agenda #23	2 weeks before meeting					
2	.	1	.	2	.	23	.	b	Toolkit Development Cross-REL working group memo #23	2 weeks after meeting					
2	.	1	.	1	.	24	.	b	Toolkit Development Cross-REL working group agenda #24	2 weeks before meeting					
2	.	1	.	2	.	24	.	b	Toolkit Development Cross-REL working group memo #24	2 weeks after meeting					
2	.	1	.	1	.	25	.	b	Toolkit Development Cross-REL working group agenda #25	2 weeks before meeting					
2	.	1	.	2	.	25	.	b	Toolkit Development Cross-REL working group memo #25	2 weeks after meeting					
2	.	1	.	1	.	26	.	b	Toolkit Development Cross-REL working group agenda #26	2 weeks before meeting					
2	.	1	.	2	.	26	.	b	Toolkit Development Cross-REL working group memo #26	2 weeks after meeting					
2	.	1	.	1	.	27	.	b	Toolkit Development Cross-REL working group agenda #27	2 weeks before meeting					
2	.	1	.	2	.	27	.	b	Toolkit Development Cross-REL working group memo #27	2 weeks after meeting					
2	.	1	.	1	.	28	.	b	Toolkit Development Cross-REL working group agenda #28	2 weeks before meeting					
2	.	1	.	2	.	28	.	b	Toolkit Development Cross-REL working group memo #28	2 weeks after meeting					
2	.	1	.	1	.	29	.	b	Toolkit Development Cross-REL working group agenda #29	2 weeks before meeting					
2	.	1	.	2	.	29	.	b	Toolkit Development Cross-REL working group memo #29	2 weeks after meeting					
2	.	1	.	1	.	30	.	b	Toolkit Development Cross-REL working group agenda #30	2 weeks before meeting					
2	.	1	.	2	.	30	.	b	Toolkit Development Cross-REL working group memo #30	2 weeks after meeting					
2	.	1	.	3	.	1	.	a	Proposal for 18 Month Literacy Cross-REL Public Facing Document	1/31/23	1/23/2023	2/7/2023	2/14/2023		
2	.	1	.	3	.	2	.	a	18 Month Literacy Cross-REL Public Facing Product	6/30/23	5/22/2023	6/12/2023	7/30/2023		
2	.	3							Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments						

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2	.	3	.	1	.	1		Signed letter(s) of intent with each regional CC in REL Region	4/25/22	4/20/2022	4/26/2022	5/9/2022		
2	.	3	.	2	.	1		Year 1 Annual memo of needs sensing between REL and CCs	3/1/23	2/28/2023	3/8/2023	3/15/2023		1
2	.	3	.	2	.	2		Year 2 Annual memo of needs sensing between REL and CCs	4/1/24	3/28/2024				1
2	.	3	.	3	.	1		Year 1 Joint needs sensing summary meeting minutes	12/5/22	12/5/2022	12/20/2022	12/19/2022		1
2	.	3	.	3	.	2		Year 2 Joint needs sensing summary meeting minutes	3/1/23	2/22/2023				1
2	.	3	.	3	.	3		Year 3 Joint needs sensing summary meeting minutes	TBD	3/28/2024	5/9/2024			1
<b>TASK 3 - Working in Partnership with Stakeholders</b>														
3	.	1	.					<b>Conduct needs-sensing and develop partnerships</b>						
3	.	1	.	1	.	1		Partnership Proposal--South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)	4/29/2022	4/15/2022	4/19/2022	5/31/2022		1
3	.	1	.	1	.	2		Partnership Proposal--Mississippi Adolescent Literacy (MSAL)	4/29/2022	4/28/2022	5/11/2022	5/31/2022		1
3	.	1	.	1	.	3		Partnership Proposal--Alabama Research Partnership on Improving English Learner Outcomes (AL ELO)	4/29/2022	4/29/2022	5/11/2022	5/31/2022		1
3	.	1	.	1	.	4		Partnership Proposal--Florida K-3 Literacy (FLK3)	11/30/2022	9/20/2022		12/30/2022		1
3	.	1	.	1	.	5		Partnership Proposal--Florida Virtual School Partnership (FLVS)	6/30/2022	6/23/2022	6/29/2022	7/29/2022		1
3	.	1	.	1	.	6		Partnership Proposal--School Climate and Literacy (SCAL4GA)	6/30/2022	6/30/2022	7/22/2022	7/30/2022		1
3	.	1	.	1	.	7		Partnership Proposal--North Carolina Competency-Based Education Partnership (NCCBE)	4/29/2022	4/29/2022	5/10/2022	5/31/2022		1
3	.	1	.	1	.	8		Partnership Proposal--Diversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	2/28/2023	2/28/2023	3/9/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.	1
3	.	1	.	1	.	9		New Partnership Proposal	As needed; 2 weeks before meeting					
3	.	1	.	1	.	10		New Partnership Proposal	As needed; 2 weeks before meeting					
3	.	2	.					<b>Maintain partnerships under subtask 3.1</b>						

3	.	2	.	1	.	1		Partnership meeting materials and agendas for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	.	2	.	2	.	1		Partnership meeting summary memos for Year 1 Quarter 1	4/28/2022	NA		5/12/2022	
3	.	2	.	1	.	2		Partnership meeting materials and agendas for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	.	2	.	2	.	2		Partnership meeting summary memos for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022	
3	.	2	.	1	.	3		Partnership meeting materials and agendas for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	1
3	.	2	.	2	.	3		Partnership meeting summary memos for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022	1
3	.	2	.	1	.	4		Partnership meeting materials and agendas for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	1
3	.	2	.	2	.	4		Partnership meeting summary memos for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023	1
3	.	2	.	1	.	5		Partnership meeting materials and agendas for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	1
3	.	2	.	2	.	5		Partnership meeting summary memos for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023	1
3	.	2	.	1	.	6		Partnership meeting materials and agendas for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023	1
3	.	2	.	2	.	6		Partnership meeting summary memos for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023	1
3	.	2	.	1	.	7		Partnership meeting materials and agendas for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023	1
3	.	2	.	2	.	7		Partnership meeting summary memos for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023	1
3	.	2	.	1	.	8		Partnership meeting materials and agendas for Year 2 Quarter 4	1/31/2024	1/18/2024	1/23/2024	2/14/2024	1
3	.	2	.	2	.	8		Partnership meeting summary memos for Year 2 Quarter 4	1/31/2024	1/18/2024	1/23/2024	2/14/2024	1
3	.	2	.	1	.	9		Partnership meeting materials and agendas for Year 3 Quarter 1	4/28/2024	4/24/2024	5/1/2024	5/12/2024	1
3	.	2	.	2	.	9		Partnership meeting summary memos for Year 3 Quarter 1	4/28/2024	4/24/2024	5/1/2024	5/12/2024	1
3	.	2	.	1	.	10		Partnership meeting materials and agendas for Year 3 Quarter 2	7/31/2024			8/14/2024	
3	.	2	.	2	.	10		Partnership meeting summary memos for Year 3 Quarter 2	7/31/2024			8/14/2024	

3	.	2	.	1	.	11		Partnership meeting materials and agendas for Year 3 Quarter 3	10/31/2024			11/14/2024		
3	.	2	.	2	.	11		Partnership meeting summary memos for Year 3 Quarter 3	10/31/2024			11/14/2024		
3	.	2	.	1	.	11		Partnership meeting materials and agendas for Year 3 Quarter 4	1/31/2025			2/14/2025		
3	.	2	.	2	.	11		Partnership meeting summary memos for Year 3 Quarter 4	1/31/2025			2/14/2025		
3	.	2	.	3	.	1		Summary of Stakeholder Feedback Survey results for partnerships Year 1	11/30/2022	11/30/2022	12/9/2022	12/14/2022		
3	.	2	.	3	.	2		Summary of Stakeholder Feedback Survey results for partnerships Year 2	11/30/2023	11/30/2023	12/1/2023	12/14/2023		
3	.	2	.	3	.	3		Summary of Stakeholder Feedback Survey results for partnerships Year 3	11/29/2024			12/13/2024		
<b>TASK 4 - Training, Coaching, and Technical Sup</b>														
4	.	1						<b>TCTS Projects</b>						
4	.	1	.	1	.	*	.	South Carolina Emergent Literacy Professional Learning Community <i>Sarah Hughes</i>	<b>Draft Date Due</b>	<b>Submitted</b>	<b>Approved</b>	<b>Final Date Due</b>		
4	.	1	.	1	.	2	.	1 Proposal for Project	4/29/2022	4/15/2022	4/21/2022	5/31/2022	1	
4	.	1	.	1	.	3	.	1 Materials and Agenda for TCTS Session 1	6/30/2022	6/28/2022	7/12/2022	7/21/2022	1	
4	.	1	.	1	.	3	.	2 Materials and Agenda for TCTS Session 2	9/30/2022	9/20/2022	9/30/2022	10/21/2022	1	
4	.	1	.	1	.	5	.	1 Interim Project Summary	12/16/2022	12/5/2022	12/15/2022		1	
4	.	1	.	1	.	3	.	3 Materials and Agenda for TCTS Session 3	12/30/2022	12/12/2022	12/20/2022	1/20/2023	1	
4	.	1	.	1	.	3	.	4 Materials and Agenda for TCTS Session 4	3/31/2023	3/13/2023	3/22/2023	4/21/2023	1	
4	.	1	.	1	.	4	.	1 Stakeholder Feedback Survey	10 working days after final event	4/11/2023	4/17/2023	25 working days after final event		1
4	.	1	.	1	.	5	.	2 Coaching Summary and Stakeholder Feedback Survey Summary	6/30/2023	4/17/2023	4/24/2023	7/21/2023	1	
4	.	1	.	1	.	2	.	2 Proposal for Extension Project	8/30/2023	8/14/2023	8/18/2023	9/20/2023	1	
4	.	1	.	1	.	3	.	5 Materials and Agenda for Extension Session 5	10/31/2023	10/26/2023	10/30/2023	11/21/2023	1	
4	.	1	.	1	.	3	.	6 Materials and Agenda for Extension Session 6	2/28/2024	2/21/2024	2/27/2024	3/20/2024	1	
4	.	1	.	1	.	3	.	7 Materials and Agenda for Extension Session 7	5/31/2024	5/13/2024		6/21/2024		
4	.	1	.	1	.	3	.	8 Materials and Agenda for Extension Session 8	8/31/2024			9/21/2024		
4	.	1	.	1	.	3	.	9 Materials and Agenda for Extension Session 9	11/30/2024			12/21/2024		
4	.	1	.	1	.	4	.	2 Extension Project Stakeholder Feedback Survey	10 working days after final event			25 working days after final event		

4	1	1	5	3	Extension Coaching Summary and Stakeholder Feedback Survey Summary	2/28/2025			3/14/2025	
4	1	1	6	1	Support Plan for PLC Facilitator	7/31/2025			8/14/2025	
4	1	2	*	*	Adolescent Literacy Strategies Grades 4-12 Content Area Teachers <i>Lee</i>					
4	1	2	2	1	Proposal	4/29/2022	4/28/2022	5/3/2022	5/29/2022	1
4	1	2	3	1	Materials and Agenda for TCTS Session 1	8/30/2022	6/27/2022	6/30/2022	9/20/2022	1
4	1	2	3	2	Materials and Agenda for TCTS Session 2	9/30/2022	7/19/2022	7/20/2022	10/21/2022	1
4	1	2	3	3	Materials and Agenda for TCTS Session 3	10/31/2022	8/22/2022	9/7/2022	11/21/2022	1
4	1	2	3	4	Materials and Agenda for TCTS Session 4	11/30/2022	9/2/2022	9/9/2022	12/21/2022	1
4	1	2	3	5	Materials and Agenda for TCTS Session 5	12/31/2022	12/9/2022	12/15/2022	1/21/2023	1
4	1	2	3	6	Materials and Agenda for TCTS Session 6	1/31/2023	1/11/2023	1/23/2023	2/21/2023	1
4	1	2	3	9	Implementation/Facilitators Guide	6/30/2023	6/26/2023	7/7/2023	7/21/2023	1
4	1	2	4	1	Stakeholder Feedback Survey	10 working days after final event	3/15/2023	3/28/2023	25 working days after final event	1
4	1	3	*	*	Evidence-Based Intervention Practices Grades 4-8 Literacy Intervention Teachers <i>MJ Taylor</i>					
4	1	3	2	1	Proposal	7/29/2022	7/15/2022	7/20/2022	8/28/2022	1
4	1	3	3	1	Materials and Agenda for Sessions 1-6 on Multisyllabic words and Fluency both grade bands	10/30/2022	10/31/2022	12/19/2022	11/20/2022	0
4	1	3	3	2	Materials and Agenda for Sessions 7-10 on Vocabulary, both grade bands	6/30/2023	6/22/2023	7/13/2023	7/21/2023	1
4	1	3	3	3	Materials and Agenda for Sessions 7A, 7B, 8A, & 8B on Vocabulary, both grade bands	11/30/2023	10/13/2023	10/23/2023	12/21/2023	1
4	1	3	3	4	Materials and Agenda for Vocabulary Leadership Walkthrough Session 3	11/30/2023	11/17/2023	11/27/2023	12/21/2023	1
4	1	3	4	1	Interim Stakeholder Feedback Survey	7/31/2024	12/13/2023	12/18/2023	8/21/2024	1
4	1	3	5	1	Interim Summary	7/31/2024	12/13/2023	12/18/2023	8/21/2024	1
4	1	3	4	2	Final Stakeholder Feedback Survey	10 working days after final event	5/14/2024	5/23/2024	25 working days after final event	1
4	1	3	5	2	Final Summary	10 working days after final event			25 working days after final event	1
4	1	4	*	*	AL ELO--Supporting Implementation of Practice Guide					

4	.	1	.	4	.	1	.	1	Concept Paper for ALEL--Supporting Implementation of Practice Guide	4/29/2022	4/29/2022	5/11/2022	5/31/2022			
4	.	1	.	4	.	2	.	1	Proposal	6/30/2022	6/13/2022	7/11/2022	7/30/2022		1	
4	.	1	.	4	.	3	.	1	Materials and Agenda for TCTS Session 1	7/12/2022	7/11/2022	7/12/2022	TBD		1	
4	.	1	.	4	.	3	.	2	Materials and Agenda for TCTS Session 2	8/12/2022	8/11/2022	8/23/2022			1	
4	.	1	.	4	.	3	.	3	Materials and Agenda for TCTS Session 3	9/13/2022	9/12/2022	9/15/2022			1	
4	.	1	.	4	.	3	.	4	Materials and Agenda for TCTS Session 4	10/7/2022	10/6/2022	10/14/2022			1	
4	.	1	.	4	.	3	.	5	Materials and Agenda for TCTS Session 5	11/29/2022	11/28/2022	12/9/2022	12/13/2022		1	
4	.	1	.	4	.	3	.	6	Materials and Agenda for TCTS Session 6	1/17/2023	1/13/2023	1/23/2023	1/31/2023		1	
4	.	1	.	4	.	3	.	7	Materials and Agenda for TCTS Session 7	2/14/2023	2/13/2023	2/21/2023	2/28/2023		1	
4	.	1	.	4	.	3	.	8	Materials and Agenda for TCTS Session 8	3/14/2023	3/14/2023	3/28/2023	3/28/2023		1	
4	.	1	.	4	.	3	.	9	Materials and Agenda for	4/11/2023	4/11/2023	4/17/2023	4/25/2023		1	
									Materials and Agenda for Coaching Session 10					Original due date was 08/30/2023. Request to change due date to TBD approved by Janelle on 09/08/2023.		
4	.	1	.	4	.	3	.	10		TBD	10/10/2023	10/19/2023	TBD			1
									Materials and Agenda for Coaching Session 11					Original due date was 11/16/2023. Janelle approved a revision to 01/31/2024 via email on 11/14/2023.		
4	.	1	.	4	.	3	.	11		1/31/2024	12/15/2023	1/5/2024	2/14/2024			1
4	.	1	.	4	.	3	.	12	Materials and Agenda for Coaching Session 12	2/15/2024	2/9/2024	2/20/2024	2/29/2024			1
4	.	1	.	4	.	3	.	13	Materials and Agenda for Coaching Session 13	4/19/2024	4/9/2024	4/16/2024	5/3/2024			1
4	.	1	.	4	.	5	.	1	Interim Project Summary	4/28/2023	5/3/2023	5/5/2023	5/12/2023			0
4	.	1	.	4	.	4	.	1	Stakeholder Feedback Survey	6/21/2024	4/23/2024	4/26/2024	25 working days after final event			1
4	.	1	.	4	.	5	.	2	Final Summary	5/31/2024	5/31/2023	6/2/2023	6/14/2024			1
4	.	1	.	5	.	*	.	*	FLK5 Implementation of K-5 Literacy Academies							
4	.	1	.	5	.	1	.	1	Concept Paper for FLK5 Implementation of K-5 Literacy Academies	9/30/2022	9/20/2022	10/2/2022	10/30/2022			1
4	.	1	.	5	.	2	.	1	Proposal	11/30/2022	11/21/2022	12/6/2022	12/30/2022			1
4	.	1	.	5	.	3	.	1	Materials and Agenda for TCTS Summer Reading Camp Session 1	1/31/2023	1/10/2023	1/23/2023	TBD			1
4	.	1	.	5	.	4	.	1	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023	25 working days after final event			1
4	.	1	.	5	.	5	.	1	Post-event Summary for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023				1
4	.	1	.	5	.	3	.	2	Materials and Agenda for TCTS Summer Reading Camp Session 2	3/31/2023	2/14/2023	2/28/2023				1

4	.	1	.	5	.	4	.	2	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023				1
4	.	1	.	5	.	5	.	2	Post-event Summary for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023				1
4	.	1	.	5	.	3	.	3	Materials and Agenda for TCTS Content Area Session 1	4/30/2023	3/30/2023	4/10/2023			1	
4	.	1	.	5	.	3	.	4	Materials and Agenda for TCTS Content Area Session 2	5/31/2023	4/19/2023	4/30/2023			1	
4	.	1	.	5	.	3	.	5	Materials and Agenda for TCTS Content Area Session 3	6/30/2023	5/8/2023	5/16/2023			1	
4	.	1	.	5	.	3	.	6	Materials and Agenda for TCTS Content Area Session 4	7/31/2023	5/9/2023	5/17/2023			1	
4	.	1	.	5	.	3	.	7	Materials and Agenda for TCTS Content Area Session 5	8/31/2023	5/12/2023	5/17/2023			1	
4	.	1	.	5	.	4	.	3	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event						
4	.	1	.	5	.	5	.	3	Post-event Summary for TCTS Content Area Sessions	10 working days after final event						
4	.	1	.	5	.	3	.	8	Materials and Agenda for TCTS Differentiated Instruction Session 1	9/30/2023	7/6/2023	7/10/2023			1	
4	.	1	.	5	.	3	.	9	Materials and Agenda for TCTS Differentiated Instruction Session 2	10/31/2023	8/10/2023	8/18/2023			1	
4	.	1	.	5	.	3	.	10	Materials and Agenda for TCTS Differentiated Instruction Session 3	11/30/2023	9/22/2023	9/26/2023			1	
4	.	1	.	5	.	4	.	4	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event	11/21/2023	11/27/2023				1
4	.	1	.	5	.	5	.	4	Post-event Summary for TCTS Content Area Sessions	10 working days after final event	11/21/2023	11/27/2023				1
4	.	1	.	6	.	*	.	1	FLVS Identification of Needs							
4	.	1	.	6	.	1	.	1	Concept Paper for FLVS Identification of Needs	6/30/2022	6/23/2022	6/29/2022	7/29/2022		1	
4	.	1	.	6	.	2	.	1	Proposal	8/5/2022	7/22/2022	7/26/2022	9/2/2022		1	
4	.	1	.	6	.	3	.	1	Materials and Agenda for TCTS Sessions 1A and 1B	10/13/2022	10/12/2022	10/19/2022	10/27/2022			
4	.	1	.	6	.	3	.	2	Materials and Agenda for TCTS Session 2	12/30/2022	10/28/2022	11/9/2022	1/13/2023		1	
4	.	1	.	6	.	3	.	3	Materials and Agenda for TCTS Session 3	1/31/2022	1/26/2023	2/7/2023	2/14/2022		0	
4	.	1	.	6	.	5	.	1	Interim Project Summary	12/15/2022	12/12/2022	12/20/2022	12/29/2022		1	
4	.	1	.	6	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event	3/14/2023	3/28/2023	25 working days after final event			1
4	.	1	.	6	.	5	.	2	Final Project Summary	3/14/2023	3/14/2023	3/28/2023	3/28/2023			

4	1	7	*	*	SCAL4GA Exploring Relationship between School Climate and School Literacy					
4	1	7	1	1	Concept Paper for SCAL4GA Exploring Relationship between School Climate and School Literacy	6/30/2022	6/30/2022	7/22/2022	7/30/2022	1
4	1	7	2	1	Proposal	8/31/2022	8/29/2022	8/31/2022	10/15/2022	1
4	1	7	3	1	Materials and Agenda for TCTS Session #1	10/31/2022	10/18/2022	10/24/2022	11/21/2022	1
4	1	7	3	2	Materials and Agenda for TCTS Session #2	12/30/2022	11/28/2022	12/4/2022	1/20/2023	1
4	1	7	3	3	Materials and Agenda for TCTS Session #3	2/28/2023	2/2/2023	2/21/2023	3/21/2023	Original due date was 01/31/2023. Date change approved via email by Janelle on 12/21/2022.
4	1	7	3	4	Materials and Agenda for TCTS Session #4	3/31/2023	3/10/2023	4/4/2023	4/21/2023	1
4	1	7	3	5	Materials and Agenda for TCTS Session #5	4/28/2023	4/17/2023	4/24/2023	5/19/2023	1
4	1	7	4	1	Stakeholder Feedback Survey	7/31/2023	7/27/2023	7/28/2023	25 working days after final event	1
4	1	7	5	1	Final Project Summary	7/31/2023	7/27/2023	7/28/2023	8/14/2023	1
4	1	8	*	*	NCCBE Implementation and Lessons Learned in CBE					
4	1	8	1	1	Concept Paper for NCCBE Implementation and Lessons Learned in CBE	4/29/2022	4/29/2022	5/10/2022	5/29/2022	1
4	1	8	2	1	Proposal	6/12/2022	6/1/2022	6/10/2022	7/12/2022	1
4	1	8	3	1	Materials and Agenda for NEAAAT TCTS Session #1	9/9/2022	9/7/2022	9/12/2022	9/23/2022	1
4	1	8	3	2	Materials and Agenda for TCTS NEHS Session #1	9/9/2022	9/6/2022	9/12/2022	9/23/2022	1
4	1	8	3	3	Materials and Agenda for NEAAAT TCTS Session #2	10/20/2022	10/20/2022	10/26/2022	11/3/2022	1
4	1	8	3	4	Materials and Agenda for NEAAAT TCTS Session #3	1/6/2023	1/6/2023	1/17/2023	1/20/2023	1
4	1	8	3	5	Materials and Agenda for NEAAAT TCTS Session #4	2/10/2023	2/10/2023	2/21/2023	2/24/2023	Original due date was 02/03/2023. Date change approved via email by Janelle on 02/03/2023.
4	1	8	3	6	Materials and Agenda for NEAAAT TCTS Session #5	3/17/2023	3/16/2023	3/28/2023	3/31/2023	Original due date was 03/03/2023. Date change approved via email by Janelle on 03/01/2023.

4	.	1	.	8	.	3	.	7	Materials and Agenda for NEAAAT TCTS Session #6	9/15/2023	9/15/2023	9/21/2023	9/29/2023	Original due date was 04/07/2023. Date change approved via email by Janelle on 03/30/2023. Date change from 05/12/2023 to 05/26/2023 approved by Janelle on 05/15/2023. Additional date change to 08/04/223 approved by Janelle on 05/24/2023. Further date change to 09/15/2023 approved by Janelle on 07/28/2023.	1
4	.	1	.	8	.	3	.	8	Materials and Agenda for NEAAAT TCTS Session #7	9/29/2023	9/25/2023	9/26/2023	10/13/2023	Original due date was 08/04/2023. Date change approved via email by Janelle on 05/24/2023. Additional date change to 09/29/2023 approved by Janelle on 07/29/2023.	1
4	.	1	.	8	.	3	.	9	Materials and Agenda for NEAAAT TCTS Session #8	10/13/2023	9/25/2023	9/28/2023	10/27/2023	Original due date was 09/08/2023. Date change approved via email by Janelle on 05/24/2023.	1
4	.	1	.	8	.	3	.	10	Materials and Agenda for NEAAAT TCTS Session #9	12/20/2023	12/14/2023	12/20/2023	1/3/2024		1
4	.	1	.	8	.	3	.	15	Materials and Agenda for NEAAAT TCTS Session #10	1/4/2024	1/4/2024	1/10/2024	1/18/2024		1
4	.	1	.	8	.	3	.	16	Materials and Agenda for NEAAAT TCTS Session #11	2/16/2024	1/19/2024	1/31/2024	3/1/2024		1
4	.	1	.	8	.	3	.	17	Materials and Agenda for NEAAAT TCTS Session #12	9/17/2024			10/1/2024		
4	.	1	.	8	.	3	.	18	Materials and Agenda for NEAAAT TCTS Session #13	10/15/2024			10/29/2024		
4	.	1	.	8	.	3	.	19	Materials and Agenda for NEAAAT TCTS Session #14	11/12/2024			11/26/2024		

4	.	1	.	8	.	3	.	20	Materials and Agenda for NEAAAT TCTS Session #15	2/17/2024			3/2/2024	
4	.	1	.	8	.	3	.	21	Materials and Agenda for NEAAAT TCTS Session #16	3/18/2024			4/1/2024	
4	.	1	.	8	.	3	.	22	Materials and Agenda for NEAAAT TCTS Session #17	4/15/2024			4/29/2024	
4	.	1	.	8	.	3	.	23	Materials and Agenda for TCTS NEHS Session #2	10/27/2022	10/20/2022	10/26/2022	11/10/2022	
4	.	1	.	8	.	3	.	11	Materials and Agenda for TCTS NEHS Session #3	2/1/2023	1/11/2023	1/23/2023	2/15/2023	Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.
4	.	1	.	8	.	3	.	12	Materials and Agenda for TCTS NEHS Session #4	3/1/2023	2/21/2023	3/2/2023	3/15/2023	Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.
4	.	1	.	8	.	3	.	13	Materials and Agenda for TCTS NEHS Session #5	TBD			TBD	Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023. On 09/06/2023, changed date from revised date of 09/01/2023 to TBD per John's email.
4	.	1	.	8	.	3	.	14	Materials and Agenda for TCTS NEHS Session #6	10/2/2023			10/16/2023	Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023. Project on hold per Kevin on 09/28/2023
4	.	1	.	8	.	4	.	1	Stakeholder Feedback Survey NEAAAT	10 working days after final event			25 working days after final event	
4	.	1	.	8	.	4	.	2	Stakeholder Feedback Survey NEHS	10 working days after final event			25 working days after final event	
4	.	1	.	8	.	5	.	1	Interim Project Summary	7/31/2023	7/21/2023	7/27/2023	8/14/2023	
4	.	1	.	8	.	5	.	2	Interim Project Summary	7/31/2024	3/22/2024	4/7/2024	8/14/2024	
4	.	1	.	8	.	5	.	3	Final Project Summary	7/31/2025			8/14/2025	
4	.	1	.	9	.	*	.	*	HBCUs Examination of Teacher Preparation Outcomes					

4	.	1	.	9	.	1	.	1	Concept Paper for HBCU Examination of Teacher Preparation Outcomes	2/28/2023	2/28/2023	3/8/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.
4	.	1	.	9	.	2	.	1	Proposal	5/31/2023	5/30/2023	6/2/2023		
4	.	1	.	9	.	3	.	1	Materials and Agenda for TCTS Sessions #1	8/15/2023	8/10/2023	8/15/2023	8/29/2023	
4	.	1	.	9	.	3	.	2	Materials and Agenda for TCTS Sessions #2	8/15/2023	8/10/2023	8/15/2023	8/29/2023	
4	.	1	.	9	.	3	.	3	Materials and Agenda for TCTS Sessions #3	10/16/2023	9/25/2023	9/26/2023	10/30/2023	
4	.	1	.	9	.	3	.	4	Materials and Agenda for TCTS Sessions #4	11/15/2023	11/9/2023	11/16/2023	11/29/2023	
4	.	1	.	9	.	3	.	5	Materials and Agenda for TCTS Sessions #5	2/15/2024	2/12/2024	2/20/2024	2/29/2024	
4	.	1	.	9	.	3	.	6	Materials and Agenda for TCTS Sessions #6	2/15/2024	2/13/2024	2/20/2024	2/29/2024	
4	.	1	.	9	.	3	.	7	Materials and Agenda for TCTS Sessions #7	8/15/2024			8/29/2024	Date Change approved by Janelle 5/3/24
4	.	1	.	9	.	3	.	8	Materials and Agenda for TCTS Sessions #8	11/15/2024			11/29/2024	
4	.	1	.	9	.	3	.	9	Materials and Agenda for TCTS Sessions #9	1/31/2025			2/14/2025	
4	.	1	.	9	.	3	.	10	Materials and Agenda for TCTS Sessions #10	3/15/2025			3/29/2025	
4	.	1	.	9	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	.	1	.	9	.	5	.	1	Interim Project Summary	5/31/2024	5/31/2024	6/5/2024		
4	.	1	.	9	.	5	.	2	Final Project Summary	5/31/2025				
4	.	1	10	.	*	.	*		Indian River School District Evaluation Planning					
4	.	1	10	.	1	.	1	1	Concept Paper	TBD	11/4/2022		TBD	
4	.	1	10	.	2	.	1	1	Proposal	TBD	12/5/2022	12/15/2022	TBD	
4	.	1	10	.	3	.	1	1	Materials and Agenda for TCTS Sessions	TBD	1/17/2023	1/24/2023	TBD	
4	.	1	10	.	4	.	1	1	Stakeholder Feedback Survey	10 working days after final event	3/22/2023	3/28/2023	25 working days after final event	
4	.	1	11	.	*	.	*		FLVS	TBD				
4	.	1	11	.	1	.	1	1	Concept Paper for FLVS	TBD	6/13/2023	6/28/2023	TBD	
4	.	1	11	.	2	.	1	1	Proposal	TBD	8/2/2023	09/06/2023	TBD	
4	.	1	11	.	3	.	1	1	Materials and Agenda for TCTS Session #1	TBD	9/25/2023	9/26/2023	TBD	
4	.	1	11	.	3	.	2	Materials and Agenda for TCTS Session #2	TBD	12/7/2023	12/14/2023	TBD		
4	.	1	11	.	3	.	3	Materials and Agenda for TCTS Session #3	3/29/2024	3/25/2024	4/7/2024	4/12/2024		
4	.	1	11	.	3	.	4	Materials and Agenda for TCTS Session #4	6/28/2024			7/12/2024		
4	.	1	11	.	3	.	5	Materials and Agenda for TCTS Session #5	8/30/2024			9/13/2024		
4	.	1	11	.	3	.	6	Materials and Agenda for TCTS Session #6	10/31/2024			11/14/2024		
4	.	1	11	.	3	.	7	Materials and Agenda for TCTS Session #7	12/31/2024			1/14/2025		

4	1	.	11	.	3	.	8	Materials and Agenda for TCTS Session #8	1/31/2025			2/14/2025	
4	1	.	11	.	3	.	9	Materials and Agenda for TCTS Session #9	4/30/2025			5/14/2025	
4	1	.	11	.	3	.	10	Materials and Agenda for TCTS Session #10	6/30/2025			7/14/2025	
4	1	.	11	.	3	.	11	Materials and Agenda for TCTS Session #11	8/29/2025			9/12/2025	
4	1	.	11	.	3	.	12	Materials and Agenda for TCTS Session #12	10/31/2025			11/14/2025	
4	1	.	11	.	3	.	13	Materials and Agenda for TCTS Session #13	12/31/2025			1/14/2026	
4	1	.	11	.	3	.	14	Materials and Agenda for TCTS Session #14	1/30/2026			2/13/2026	
4	1	.	11	.	3	.	15	Materials and Agenda for TCTS Session #15	4/30/2026			5/14/2026	
4	1	.	11	.	3	.	16	Materials and Agenda for TCTS Session #16	6/30/2026			7/14/2026	
4	1	.	11	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event	6/30/2026		25 working days after final event	
4	1	.	11	.	5	.	1	Interim Project Summary	7/31/2024				
4	1	.	11	.	5	.	2	Interim Project Summary	7/31/2025				
4	1	.	11	.	5	.	3	Final Project Summary	7/31/2026				
4	1	.	12	.	*	.	*	SCAL4GA Exploring Relationship between School Climate and School Literacy	TBD				
4	1	.	12	.	1	.	1	Concept Paper	TBD	11/20/2023	11/22/2023	TBD	
4	1	.	12	.	2	.	1	Proposal	TBD	1/30/2024	2/15/2024	TBD	
4	1	.	12	.	3	.	1	Materials and Agenda for TCTS Session 1	3/22/2024			TBD	
4	1	.	12	.	3	.	2	Materials and Agenda for TCTS Session 2	6/6/2024	6/6/2024			
4	1	.	12	.	3	.	3	Materials and Agenda for TCTS Session 3	8/15/2024				
4	1	.	12	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	.	12	.	5	.	2	Final Project Summary	9/30/2024				
4	1	.	13	.	*	.	*	TBD - Year 3 or later	TBD				
4	1	.	13	.	1	.	1	Concept Paper	TBD			TBD	
4	1	.	13	.	2	.	1	Proposal	TBD			TBD	
4	1	.	13	.	3	.	1	Materials and Agenda for TCTS Sessions	TBD			TBD	
4	1	.	13	.	4	.	1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	
4	1	.	13	.	5	.	1	Interim Project Summary	TBD				
4	1	.	13	.	5	.	2	Final Project Summary	TBD				
4	1	.	14	.	*	.	*	TBD - Starting Year 3	TBD				
4	1	.	14	.	1	.	1	Concept Paper	TBD			TBD	
4	1	.	14	.	2	.	1	Proposal	TBD			TBD	
4	1	.	14	.	3	.	1	Materials and Agenda for TCTS Sessions	TBD			TBD	
4	1	.	14	.	4	.	1	Summary of Stakeholder Feedback Survey results session 1	10 working days after final event			25 working days after final event	
4	1	.	14	.	5	.	1	Interim Project Summary	TBD				
4	1	.	14	.	5	.	2	Final Project Summary	TBD				
4	2							Ask an Expert					

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4	.	2	.	1	.	1		Ask an Expert Proposal-FCS Assistance	TBD	3/16/22	3/18/22	TBD		
4	.	2	.	2	.	1		Ask an Expert responses memo for Meeting #1	5/5/22	5/5/22	5/13/2022			1
4	.	2	.	3	.	1		Ask an Expert responses memo for Meeting #2	5/19/22	5/18/22	5/19/2022			1
4	.	2	.	1	.	2		Ask an Expert Proposal	TBD	7/13/22	7/13/22			1
4	.	2	.	2	.	2		Ask an Expert responses memo	5 working days after each meeting with the requestor	9/15/2022	9/16/2022			1
4	.	2	.	1	.	3		Ask an Expert Proposal	TBD	12/15/22	1/4/23		Concept paper and proposal submitted and approved. Janelle said proposal was not necessary.	1
4	.	2	.	2	.	3		Ask an Expert responses memo	5 working days after each meeting with the requestor	3/23/2023	4/4/2023			1
4	.	2	.	1	.	4		FLVS Lit Review	5/13/2024	5/13/24	5/20/24			
4	.	2	.	1	.	4	a	FLVS Lit Review Materials	6/14/2024					
4	.	2	.	2	.	4		Ask an Expert responses memo	7/12/2024					
4	.	2	.	1	.	5		Ask an Expert Proposal	TBD					
4	.	2	.	2	.	5		Ask an Expert responses memo	5 working days after each meeting with the requestor					
4	.	2	.	1	.	6		Ask an Expert Proposal	TBD					
4	.	2	.	2	.	6		Ask an Expert responses memo	5 working days after each meeting with the requestor					
<b>TASK 5 - Applied Research and Peer Reviewed R</b>														
5	.	1						Conduct original, empirical research and develop products						
5	.	1	.	1	.	*		Evaluating the Implementation of the Emergent Literacy PLC Sarah Herrera						
5	.	1	.	1	.	2		Proposal	4/29/2022	4/28/2022	7/13/2022	9/30/2022		1
5	.	1	.	1	.	3		Notice of IRB approval or exemption	9/30/2022	9/30/2022	10/12/2022	10/21/2022		1
5	.	1	.	1	.	4		Data Management Plan	4/29/2022	4/28/2022	7/13/2022	9/30/2022		1
5	.	1	.	1	.	5		OMB clearance package (if applicable to the study)	9/30/2022	9/30/2022		2/28/2023		1
5	.	1	.	1	.	6		Data sharing agreement	10/14/2022	10/13/2022		11/4/2022		1
5	.	1	.	1	.	7		Research Report	6/30/2025			2/28/2026		1
5	.	1	.	2	.	*		AL ELO HQIA+						
5	.	1	.	2	.	1		Concept Paper	10/31/2022	10/27/2022		11/14/2022		1
5	.	1	.	2	.	2		Proposal	4/30/2023	3/31/2023	7/14/2023	5/21/2023		
5	.	1	.	2	.	3		Notice of IRB approval or exemption		2/20/2024	2/20/2024			1

5	.	1	.	2	.	4		Data Management Plan (if applicable to the study)	TBD				Original due date 06/30/2023. Delayed until TBD as proposal has not been reviewed by RPR. 05/30/2023
5	.	1	.	2	.	6		Data sharing agreement or memorandum of understanding (optional)	11/17/2023			12/1/2023	Original due date was 08/31/2023. Date change approved via email by Janelle on 08/21/2023. Date then changed from 10/31/2023 to 11/17/2023 via email with Janelle on 11/09/2023.
5	.	1	.	2	.	7		Research Report	6/30/2025			TBD	
5	.	1	.	3	.	*		Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades <i>Katie Dahlke</i>					
5	.	1	.	3	.	2		Proposal Toolkit Evaluation	9/29/2023	9/29/2023	2/6/2024	3/31/2023	1
5	.	1	.	3	.	3		Notice of IRB approval or exemption	9/30/2024			9/30/2024	
5	.	1	.	3	.	4		Data Management Plan	9/29/2023	9/29/2023		3/31/2023	
5	.	1	.	3	.	5		OMB clearance package	3/30/2024	3/22/2024	4/23/2024	9/30/2024	
5	.	1	.	3	.	6		Data sharing agreement or memorandum of understanding	5/31/2025			6/30/2024	
5	.	1	.	3	.	7		Research Report	7/31/2026			12/30/2026	
5	.	1	.	4	.	*		Competency Based Education as a Promising Practice for Improving Student Outcomes at NEAAAT					
5	.	1	.	4	.	1		Concept Paper		3/19/2024	3/29/2024		
5	.	1	.	4	.	2		Proposal	6/30/2024				
5	.	1	.	4	.	3		Notice of IRB approval or exemption	9/30/2024				
5	.	1	.	4	.	4		Data Management Plan (if applicable to the study)	9/30/2024				
5	.	1	.	4	.	6		Data sharing agreement or memorandum of understanding (optional)	4/25/2025				
5	.	1	.	4	.	7		Draft Research Report	11/30/2025				
5	.	1	.	4	.	8		Draft Research Report	11/30/2026				
5	.	1	.	5	.	*		TBD					
5	.	1	.	5	.	*		TBD Year 3 or later	TBD				
5	.	1	.	5	.	1		Concept Paper	TBD				
5	.	1	.	5	.	2		Proposal	TBD				
5	.	1	.	5	.	3		Notice of IRB approval or exemption	TBD				
5	.	1	.	5	.	4		Data Management Plan (if applicable to the study)	TBD				
5	.	1	.	5	.	5		OMB clearance package (if applicable to the study)	TBD				

5	1	.	5	.	6		Data sharing agreement or memorandum of understanding (optional)	TBD				
5	1	.	5	.	7		Research Report	TBD				
5	1	.	6	.	*		TBD					
5	1	.	6	.	*		TBD Year 3 or later	TBD				
5	1	.	6	.	1		Concept Paper	TBD				
5	1	.	6	.	2		Proposal	TBD				
5	1	.	6	.	3		Notice of IRB approval or exemption	TBD				
5	1	.	6	.	4		Data Management Plan (if applicable to the study)	TBD				
5	1	.	6	.	5		OMB clearance package (if applicable to the study)	TBD				
5	1	.	6	.	6		Data sharing agreement or memorandum of understanding (optional)	TBD				
5	1	.	6	.	7		Applied research written product	TBD				
5	2	.	*	.	*		<b>Toolkit Design: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades</b> <i>Marcia Kosanovich</i>					
5	2	.	1	.	2		Proposal Toolkit Development	3/31/2022	3/31/2022	7/14/2023	7/29/2022	
5	2	.	1	.	3		Toolkit	1/31/2024	1/12/2024		8/29/2025	
5	2	.	1	.	4		Memo Documenting changes based on usability testing	7/1/2024			9/15/2024	
5	4	.	*	.	*		<b>Develop Tools to Support Research Processes and Research-Based Practices.</b>					
5	4	.	1	.	*		MS Adolescent Literacy PLC					
5	4	.	1	.	1		Concept Paper	TBD	4/11/23	4/21/23		
5	4	.	1	.	2		Proposal	TBD	7/10/23	9/18/23		
5	4	.	1	.	3		Draft Tool	8/31/2025	3/28/24	4/26/24		
5	4	.	1	.	4		Final Tool	8/31/2026				
5	4	.	2	.	*		Emergent Literacy PLC					NEW
5	4	.	2	.	1		Concept Paper		6/4/24		TBD	NEW
5	4	.	2	.	2		Proposal	7/31/24			TBD	NEW
5	4	.	2	.	5	.	1 Sessions 1-6 Materials and Videos	2/28/25				NEW
5	4	.	2	.	5	.	2 Sessions 7-16 Materials and Videos	4/30/25				NEW
5	4	.	2	.	5	.	3 Sessions 17-22 Materials and Videos	6/30/25				NEW
5	4	.	2	.	5	.	4 Sessions 23-28 Materials and Videos	8/29/25				NEW
5	4	.	2	.	5	.	5 Usability testing and revisions memo	11/28/25				NEW
5	4	.	2	.	3		Draft Tool	12/31/2025				NEW
5	4	.	2	.	4		Final Tool	7/31/2026				NEW

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5	5	1	1		Conduct assessment of research study quality for ESSA compliance					
5	5	1	1		Concept Paper	As needed				
5	5	2	1		Proposal	As proposed				
5	5	3	1		Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed				
5	5	4	1		Summary memo and/or associated materials stakeholders	As proposed				
<b>TASK 6 - Dissemination</b>										
6	1				Develop website content					
					N/A					
6	2				Develop Dissemination Materials					
					Infographics/Factsheets					
6	2	1	1		Infographic 1- SCAL4GA Exploring Relationship between School Climate and School Literacy	12/31/2022	7/28/2023	9/12/2023	5/20/2023	0
6	2	1	2		Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022	7/6/2022	6/30/2022	0
6	2	1	3		Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic Factsheet	6/13/2022	6/17/2022	7/6/2022		0
6	2	1	4		Improving Adolescent Literacy Infographic	TBD	7/7/2023	07/13//2024		1
6	2	1	5		Evidence Based Practices for Emergent Literacy Infographic	TBD	7/14/2023	7/19/2023		1
6	2	1	6		Supporting Facilitators Implementing the PLC EL Infographic	TBD	7/13/2023	7/24/2023		1
6	2	1	7		Infographic/factsheet 7	TBD				
6	2	1	8		Infographic/factsheet 8	TBD				
6	2	1	9		Infographic/factsheet 9	TBD				
6	2	1	10		Infographic/factsheet 10	TBD				
					Audio Files					
6	2	2	1	1	Proposal	As needed				
6	2	2	2	1	Script for audio file 1	TBD				
6	2	2	3	1	Audio file 1	TBD				
6	2	2	1	2	Proposal	As needed				
6	2	2	2	2	Script for audio file 2	TBD				
6	2	2	3	2	Audio file 2	TBD				
6	2	2	1	3	Proposal	As needed				
6	2	2	2	3	Script for audio file 3	TBD				
6	2	2	3	3	Audio file 3	TBD				
					Videos					
6	2	3	1	1	Proposal	As needed	10/10/2023	10/19/2023		1
6	2	3	2	1	Script and storyboard for video 1	TBD				
6	2	3	3	1	Video 1	TBD				
6	2	3	1	2	Proposal	As needed				

6	2	.	3	.	2	.	2	Script and storyboard for video 2	TBD					
6	2	.	3	.	3	.	2	Video 2	TBD					
6	2	.	3	.	1	.	3	Proposal	As needed					
6	2	.	3	.	2	.	3	Script and storyboard for video 3	TBD					
6	2	.	3	.	3	.	3	Video 3	TBD					
6	2	.	3	.	1	.	4	Proposal	As needed					
6	2	.	3	.	2	.	4	Script and storyboard for video 4	TBD					
6	2	.	3	.	3	.	4	Video 4	TBD					
<b>Host events and conference presentations</b>														
6	3	.	1	.	1	.		SSSR EL SRG	TBD	5/13/2022	5/19/2022	TBD		1
6	3	.	2	.	1	.		Agenda and materials	2 weeks before event	6/28/2022	6/30/2022	TBD		1
6	3	.	3	.	1	.		Stakeholder feedback survey	2 weeks after event	7/28/2022	7/29/2022	TBD		1
6	3	.	1	.	2	.		PAEC Teacher Guides	TBD	5/13/2022	5/19/2022	TBD		1
6	3	.	2	.	2	.		Agenda and materials	2 weeks before event	7/1/2022	7/12/2022	TBD		1
6	3	.	3	.	2	.		Stakeholder feedback survey	2 weeks after event			TBD		1
6	3	.	1	.	3	.		CBE Summer Institute proposal	TBD	7/26/2022	7/27/2022	TBD		1
6	3	.	2	.	3	.		Agenda and materials	2 weeks before event	7/26/2022	7/27/2022	TBD		1
6	3	.	3	.	3	.		Stakeholder feedback survey	2 weeks after event	8/23/2022	8/26/2022	TBD		1
6	3	.	1	.	4	.		MS Literacy Association Conference	TBD	8/30/2022	9/6/2022	TBD		1
6	3	.	2	.	4	.		Agenda and materials	2 weeks before event	11/15/2022	11/21/2022	TBD		1
6	3	.	3	.	4	.		Stakeholder feedback survey	2 weeks after event	12/16/2022	12/30/2022	TBD		1
6	3	.	1	.	5	.		FL Association of Teacher Educators Conference	TBD	8/30/2022	9/6/2022	TBD		1
6	3	.	2	.	5	.		Agenda and materials	2 weeks before event	11/16/2022	11/19/2022	TBD		1
6	3	.	3	.	5	.		Stakeholder feedback survey	2 weeks after event			TBD		1
6	3	.	1	.	6	.		Proposal for MS Literacy Association Conference	TBD	9/19/2023	10/27/2023	TBD		1
6	3	.	2	.	6	.		Agenda and materials	2 weeks before event	11/6/2023	11/13/2023	TBD		1
6	3	.	3	.	6	.		Stakeholder feedback survey	2 weeks after event			TBD		1
6	3	.	1	.	7	.		AMTESOL conference proposal	TBD	12/15/2022	12/30/2022	TBD		1
6	3	.	2	.	7	.		Agenda and materials	2 weeks before event	1/13/2023	1/31/2023	TBD		1
6	3	.	3	.	7	.		Stakeholder feedback survey	2 weeks after event			TBD	No SFS will be completed for this event.	
6	3	.	1	.	8	.		HEC Literary Tools for Coaching proposal	TBD	3/2/2023	3/13/2023	TBD		1
6	3	.	2	.	8	.		Agenda and materials	2 weeks before event	3/24/2023	4/4/2023	TBD		1
6	3	.	3	.	8	.		Stakeholder feedback survey	2 weeks after event			TBD		

6	.	3	.	1	.	9		HEC - Teacher Guides Family Literacy proposal	TBD	4/11/2023	4/18/2023	TBD		1
6	.	3	.	2	.	9		Agenda and materials	2 weeks before event	5/23/2023	6/1/2023	TBD		1
6	.	3	.	3	.	9		Stakeholder feedback survey	2 weeks after event	6/26/2023	6/27/2023	TBD		1
6	.	3	.	1	.	10		PAEC Leadership Conference – REL SE Literacy Tools proposal	TBD	4/11/2023	4/17/2023	TBD		1
6	.	3	.	2	.	10		Agenda and materials	2 weeks before event	6/28/2023	7/7/2023	TBD		1
6	.	3	.	3	.	10		Stakeholder feedback survey	2 weeks after event	8/2/2023	8/11/2023	TBD		1
6	.	3	.	1	.	11		Proposal for event or required proposal for conference presentation	As needed			TBD		
6	.	3	.	2	.	11		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	11		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	12		Engaging Families in K-5 Math: A Toolkit Treat Proposal	As needed	8/25/2023	9/5/2023	TBD		1
6	.	3	.	2	.	12		Agenda and materials	2 weeks before event	9/5/2023	9/12/2023	TBD		1
6	.	3	.	3	.	12		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	13		Florida Literacy Conference proposal	As needed	12/1/2023	12/8/2023	TBD		1
6	.	3	.	2	.	13		Agenda and materials	2 weeks before event	12/11/2023	12/14/2023	TBD		1
6	.	3	.	3	.	13		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	14		Innovations through CBE	As needed	12/6/2023	12/13/2023	TBD		1
6	.	3	.	2	.	14		Agenda and materials	2 weeks before event	1/24/2024	2/21/2024	TBD		1
6	.	3	.	3	.	14		Stakeholder feedback survey	2 weeks after event	3/7/2024		TBD		1
6	.	3	.	1	.	15		Literacy Reimagined Conference	As needed	1/12/2024	1/18/2024	TBD		1
6	.	3	.	2	.	15		Agenda and materials	2 weeks before event	2/7/2024	2/14/2024	TBD		1
6	.	3	.	3	.	15		Stakeholder feedback survey	2 weeks after event			TBD		1
6	.	3	.	1	.	16		Summer Reading Camps for JRF	As needed	11/29/2023	12/1/2023	TBD		1
6	.	3	.	2	.	16		Agenda and materials	2 weeks before event	12/14/2023	12/20/2023	TBD		1
6	.	3	.	3	.	16		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	17		Proposal UNA REL SE Tools for Teacher Prep	As needed	11/20/2023	11/27/2023	TBD		1
6	.	3	.	2	.	17		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	17		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	18		Heartland Consortium Event	As needed	3/19/2024	3/27/2024	TBD		
6	.	3	.	2	.	18		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	18		Stakeholder feedback survey	2 weeks after event			TBD		

6	.	3	.	1	.	19		Summer Reading Camps for PAEC	As needed	2/6/2024	2/8/2024	TBD		
6	.	3	.	2	.	19		Agenda and materials	2 weeks before event	2/6/2024	2/8/2024	TBD		1
6	.	3	.	3	.	19		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	20		Proposal for Nassau county event	As needed	5/22/2024	5/24/2024	TBD		1
6	.	3	.	2	.	20		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	20		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	21		Proposal for PAEC Event	As needed	3/20/2024	3/25/2024	TBD		1
6	.	3	.	2	.	21		Agenda and materials	2 weeks before event	4/8/2024	4/16/2024	TBD		1
6	.	3	.	3	.	21		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	22		Proposal for MDE Literacy Coaches	As needed	4/15/2024		TBD		1
6	.	3	.	2	.	22		Agenda and materials	2 weeks before event	4/17/2024	4/18/2024	TBD		
6	.	3	.	3	.	22		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	23		Proposal for Summer PAEC Event	As needed	5/14/2024	5/23/2024	TBD		1
6	.	3	.	2	.	23		Agenda and materials	2 weeks before event	6/25/2024		TBD		
6	.	3	.	3	.	23		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	24		Proposal for Aurora Conference	As needed	6/4/2024		TBD		
6	.	3	.	2	.	24		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	24		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	25		Proposal for event or required proposal for conference presentation	As needed			TBD		
6	.	3	.	2	.	25		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	25		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	26		Proposal for event or required proposal for conference presentation	As needed			TBD		
6	.	3	.	2	.	26		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	26		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	27		Proposal for event or required proposal for conference presentation	As needed			TBD		
6	.	3	.	2	.	27		Agenda and materials	2 weeks before event			TBD		
6	.	3	.	3	.	27		Stakeholder feedback survey	2 weeks after event			TBD		
6	.	3	.	1	.	28		Proposal for event or required proposal for conference presentation	As needed			TBD		
6	.	3	.	2	.	28		Agenda and materials	2 weeks before event			TBD		

6	.	3	.	3	.	28		Stakeholder feedback survey	2 weeks after event			TBD	
6	.	3	.	1	.	29		Proposal for event or required proposal for conference presentation	As needed			TBD	
6	.	3	.	2	.	29		Agenda and materials	2 weeks before event			TBD	
6	.	3	.	3	.	29		Stakeholder feedback survey	2 weeks after event			TBD	
6	.	3	.	1	.	30		Proposal for event or required proposal for conference presentation	As needed			TBD	
6	.	3	.	2	.	30		Agenda and materials	2 weeks before event			TBD	
6	.	3	.	3	.	30		Stakeholder feedback survey	2 weeks after event			TBD	
6	.	3	.	1	.	31		Proposal for event or required proposal for conference presentation	As needed			TBD	
6	.	3	.	2	.	31		Agenda and materials	2 weeks before event			TBD	
6	.	3	.	3	.	31		Stakeholder feedback survey	2 weeks after event			TBD	
<b>6</b>	<b>.</b>	<b>4</b>						<b>Newsletters</b>					
6	.	4	.	1	.	1		Newsletter 1 April 2022	3/18/2022	3/22/2022	3/28/2021	4/1/2022	0
6	.	4	.	1	.	2		Newsletter 2 May 2022	4/15/2022	4/15/2022	4/19/2022	4/29/2022	1
6	.	4	.	1	.	3		Newsletter 3 June 2022	5/20/2022	5/17/2022	5/19/2022	6/3/2022	1
6	.	4	.	1	.	4		Newsletter 4 July 2022	6/17/2022	6/17/2022	6/28/2022	7/1/2022	1
6	.	4	.	1	.	5		Newsletter 5 Aug 2022	7/15/2022	7/11/2022	7/12/2022	7/29/2022	1
6	.	4	.	1	.	6		Newsletter 6 Sept 2022	8/19/2022	8/19/2022	8/26/2022	9/2/2022	1
6	.	4	.	1	.	7		Newsletter 7 Oct 2022	9/16/2022	9/15/2022	9/16/2022	9/30/2022	1
6	.	4	.	1	.	8		Newsletter 8 Nov 2022	10/14/2022	10/14/2022	10/20/2022	10/28/2022	1
6	.	4	.	1	.	9		Newsletter 9 Dec 2022	11/18/2022	11/18/2022	12/5/2022	12/2/2022	1
6	.	4	.	1	.	10		Newsletter 10 Jan 2023	12/16/2022	12/9/2022	12/20/2022	12/30/2022	1
6	.	4	.	1	.	11		Newsletter 11 Feb 2023	1/20/2023	1/19/2023	2/3/2023	2/3/2023	1
6	.	4	.	1	.	12		Newsletter 12 March 2023	2/17/2023	2/13/2023	2/22/2023	3/3/2023	1
6	.	4	.	1	.	13		Newsletter 13 April 2023	3/17/2023	3/16/2023	4/4/2023	3/31/2023	1
6	.	4	.	1	.	14		Newsletter 14 May 2023	4/21/2023	4/18/2023	4/28/2023	5/5/2023	1
6	.	4	.	1	.	15		Newsletter 15 June 2023	5/19/2023	5/17/2023	5/18/2023	6/2/2023	1
6	.	4	.	1	.	16		Newsletter 16 July 2023	6/23/2023	6/23/2023	7/5/2023	7/7/2023	1
6	.	4	.	1	.	17		Newsletter 17 August 2023	7/31/2023	7/19/2023	7/19/2023	8/14/2023	1
6	.	4	.	1	.	18		Newsletter 18 Sept 2023	8/31/2023	8/7/2023	8/11/2023	9/14/2023	1
6	.	4	.	1	.	19		Newsletter 19 Oct 2023	9/30/2023	9/11/2023	9/15/2023	10/14/2023	1
6	.	4	.	1	.	20		Newsletter 20 Nov 2023	10/31/2023	10/10/2023	10/26/2023	11/14/2023	1
6	.	4	.	1	.	21		Newsletter 21 Dec 2023	11/30/2023	11/20/2023	11/28/2023	12/14/2023	1
6	.	4	.	1	.	22		Newsletter 22 Jan 2024	12/8/2023	12/12/2023	1/17/2024	12/22/2023	0
6	.	4	.	1	.	23		Newsletter 22 Feb 2024	1/19/2024	1/24/2024	2/12/2024	2/2/2024	0
6	.	4	.	1	.	24		Newsletter 24 March 2024	2/15/2024	2/15/2024	2/28/2024	2/29/2024	1
6	.	4	.	1	.	25		Newsletter 25 April 2024	3/15/2024	3/15/2024	3/25/2024	3/29/2024	1
6	.	4	.	1	.	26		Newsletter 26 May 2024	4/16/2024	4/16/2024	5/9/2024	4/30/2024	1
6	.	4	.	1	.	27		Newsletter 27 June 2024-August 2024	7/19/2024			Revised schedule approved per Janelle's email on 5/3/24	
6	.	4	.	1	.	28		Newsletter 28 July 2024-November 2024	10/17/2024			8/2/2024	
6	.	4	.	1	.	29		Newsletter 29 August 2024-February 2025	1/17/2025			10/31/2024	
6	.	4	.	1	.	30		Newsletter 30 Sept 2024-May 2025	4/16/2025			1/31/2025	

6	.	4	.	1	.	31		Newsletter 31 Oct 2024-August 2025	7/17/2025			7/31/2025		
6	.	4	.	1	.	32		Newsletter 32 Nov 2024-November 2025	10/17/2025			10/31/2025		
6	.	4	.	1	.	33		Newsletter 33 Dec 2024-February 2026	1/16/2026			1/30/2026		
<b>6</b>	<b>.</b>	<b>5</b>						<b>Maintain a blog</b>						
6	.	5	.	1	.	1		Blog 1	4/29/2022	4/20/2022	4/27/2022	5/13/2022	1	
6	.	5	.	1	.	2		Blog 2	6/30/2022	6/29/2022	7/20/2022	7/14/2022	1	
6	.	5	.	1	.	3		Blog 3	8/31/2022	8/23/2022	9/2/2022	9/14/2022	1	
6	.	5	.	1	.	4		Blog 4	10/31/2022	10/17/2022	11/19/2022	11/14/2022	1	
6	.	5	.	1	.	5		Blog 5	12/16/2022	12/14/2022	1/24/2023	12/30/2022	1	
								Blog 6						
6	.	5	.	1	.	6			3/31/2023	3/27/2023	4/21/2023	4/14/2023	Originally due 02/28/2023. Date change to 03/31/2023 approved by Janelle via email on 02/16/2023.	
6	.	5	.	1	.	7		Blog 7	4/28/2023	4/3/2023	4/28/2023	5/12/2023	1	
6	.	5	.	1	.	8		Blog 8	6/30/2023	6/30/2023	7/27/2023	7/14/2023	1	
								Blog 9					Originally due 08/31/2023. Date change to 10/06/2023 approved by Janelle via email on 09/05/2023.	
6	.	5	.	1	.	10		Blog 10	10/31/2023	10/10/2023	10/27/2023	11/14/2023	1	
6	.	5	.	1	.	11		Blog 11	12/15/2023	11/28/2023	12/7/2023	12/29/2023	1	
6	.	5	.	1	.	12		Blog 12	2/28/2024	2/13/2024	2/29/2024	3/13/2024	1	
6	.	5	.	1	.	13		Blog 13	4/30/2024	4/3/2024	5/1/2024	5/14/2024	1	
6	.	5	.	1	.	14		Blog 14	6/30/2024			7/14/2024	1	
6	.	5	.	1	.	15		Blog 15	8/30/2024			9/13/2024	1	
6	.	5	.	1	.	16		Blog 16	10/31/2024			11/14/2024	1	
<b>6</b>	<b>.</b>	<b>6</b>						<b>Maintain a social media presence</b>						
6	.	6	.	1	.	1		Tweet 1 Year 1 Quarter 1	4/29/2022	4/18/2022	4/20/2022	5/13/2022	1	
6	.	6	.	1	.	2		Tweet 2 Year 1 Quarter 2	7/29/2022	7/25/2022	7/27/2022	8/12/2022	1	
6	.	6	.	1	.	3		Tweet 3 Year 1 Quarter 3	10/31/2022	10/4/2022	10/14/2022	11/14/2022	1	
6	.	6	.	1	.	4		Tweet 4 Year 1 Quarter 4	1/31/2023	1/5/2023	1/17/2023	2/14/2023	1	
6	.	6	.	1	.	5		Tweet 5 Year 2 Quarter 1	4/28/2023	4/4/2023	4/17/2023	5/12/2023	1	
6	.	6	.	1	.	6		Tweet 6 Year 2 Quarter 2	7/31/2023	7/10/2023	7/12/2023	8/14/2023	1	
6	.	6	.	1	.	7		Tweet 7 Year 2 Quarter 3	10/31/2023	10/10/2023	10/18/2023	11/14/2023	1	
6	.	6	.	1	.	8		Tweet 8 Year 2 Quarter 4	1/31/2024	1/5/2024	1/10/2024	2/14/2024	1	
6	.	6	.	1	.	9		Tweet 9 Year 3 Quarter 1	4/30/2024	4/2/2024	4/16/2024	5/14/2024	1	
6	.	6	.	1	.	10		Tweet 10 Year 3 Quarter 2	7/31/2024			8/14/2024	1	
6	.	6	.	1	.	11		Tweet 11 Year 3 Quarter 3	10/31/2024			11/14/2024	1	
6	.	6	.	1	.	12		Tweet 12 Year 3 Quarter 4	1/31/2025			2/14/2025	1	
<b>6</b>	<b>.</b>	<b>7</b>						<b>Branding Materials</b>						
6	.	7	.	1	.	1	.	1	Proposal for video 1	As needed				454
6	.	7	.	1	.	2	.	1	Script and storyboard for video 1	As needed				471
6	.	7	.	1	.	3	.	1	Video 1	As needed				0.96
6	.	7	.	2	.	1	.	1	Brochure or handout	As needed				





UNITED STATES DEPARTMENT OF EDUCATION  
 OFFICE OF FINANCE AND OPERATIONS  
 OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

***Determination and Findings to Revise Deliverables 91990022C0014 - REL Southeast P00007***

Contract Number:	91990022C0014 - REL Southeast
Period of Performance:	January 24, 2022, through January 2, 2027
Acquisition Plan Tracking Number:	663
Purchase Request Number:	N/A
Purchase Amount:	\$50,000.00 add to CLIN 0009
NAICS Code:	611710: Educational Support Services
UEI	JF2BLNN4PJC3
Product and Service Code (PSC):	R499: Support Professional: Other
Service Contract Coding Declaration:	Other Function

**AUTHORITY**

Modification P00004 is executed in accordance with the following contract clauses:

Clause 52.243-2 Alternate I: Changes – Cost Reimbursement; FAR 52.232-22 – Limitation of Funds FAR 43.103(a)(3) – Mutual Agreement of the Parties.

**BACKGROUND**

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

## **PURPOSE/ DESCRIPTION OF CHANGES**

- Add \$50,000.00 to CLIN 0009 Regional Education Laboratories (REL) Southeast Year 3 Funding (Travel). This modification was a follow-up with Modification P00006 that de-obligated \$50,000.00 from CLIN 0008 (Regional Educational Laboratories (REL) Southeast Year 3 Funding (Non-Travel)).
- The total contract value will be increased by \$50,000.00 from \$27,753,000.00 to \$27,803,000.00.
- The total contract funding will be increased by \$50,000.00 from \$18,267,916.96 to \$18,317,916.96.

## **FUNDING**

- The total contract value will be increased by \$50,000.00 from \$27,753,000.00 to \$27,803,000.00.
- The total contract funding will be increased by \$50,000.00 from \$18,267,916.96 to \$18,317,916.96.

## **PERIOD OF PERFORMANCE**

This modification does not affect the period of performance. The period of performance remains January 24, 2022, through January 2, 2027.

## **SYNOPSIS**

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

## **SCOPE OF WORK**

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition, nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

## **RECOMMENDATION**

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with modification P00007.

Recommend:

7/11/2024

Jana Knapp

Ms. Jana Knapp  
Contract Specialist  
Signed by: Office of Finance and Operations

Approve:

7/23/2024

Joseph Gibbs

Mr. Joseph Gibbs  
Contracting Officer  
Signed by: Office of Finance and Operations

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>			1. CONTRACT ID CODE	PAGE OF PAGES
				1 3
2. AMENDMENT/MODIFICATION NUMBER  91990022C0014P00007	3. EFFECTIVE DATE  JUL 24, 2024	4. REQUISITION/PURCHASE REQUISITION NUMBER	5. PROJECT NUMBER <i>(If applicable)</i>	
6. ISSUED BY  US Department of Education 400 Maryland Avenue SW, LBJ-2C274 Washington DC 20202	CODE  CAMLBJ	7. ADMINISTERED BY <i>(If other than Item 6)</i>  See Block 6	CODE	
8. NAME AND ADDRESS OF CONTRACTOR <i>(Number, street, county, State and ZIP Code)</i>  FLORIDA STATE UNIVERSITY 874 TRADITIONS WAY TALLAHASSEE FL 32306			(X) 9A. AMENDMENT OF SOLICITATION NUMBER  UEI: JF2BLNN4PJC3 Cage Code: 3S772	9B. DATED <i>(SEE ITEM 11)</i>
				10A. MODIFICATION OF CONTRACT/ORDER NUMBER 91990022C0014
			(X) 10B. DATED <i>(SEE ITEM 13)</i>	JAN 24, 2022
CODE 00027876	FACILITY CODE			

**11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS**

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:  
 (a) By completing items 8 and 15, and returning \_\_\_\_\_ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA *(If required)* Modification Amount: \$50,000.00  
 See Schedule Modification Obligated Amount: \$50,000.00

<b>13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NUMBER AS DESCRIBED IN ITEM 14.</b>	
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: <i>(Specify authority)</i> THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NUMBER IN ITEM 10A.  <input type="checkbox"/>
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES <i>(such as changes in paying office, appropriation data, etc.)</i> SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).  <input type="checkbox"/>
<input checked="" type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes Cost Reimbursement  <input type="checkbox"/>
	D. OTHER <i>(Specify type of modification and authority)</i>  <input type="checkbox"/>

**E. IMPORTANT:** Contractor  is not  is required to sign this document and return 1 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION *(Organized by UCF section headings, including solicitation/contract subject matter where feasible.)*

Please see attached.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER <i>(Type or print)</i>  Dr. Stacey Patterson, Vice President for Research	16A. NAME AND TITLE OF CONTRACTING OFFICER <i>(Type or print)</i>  Joseph Gibbs, contract specialist 202-453-7716 Joseph.Gibbs@ed.gov		
15B. CONTRACTOR/OFFEROR  Rose Driber for Stacey Patterson, VPR Digitally signed by Rose Driber for Stacey Patterson, VPR Date: 2024.07.24 09:19:36 -04'00'  (Signature of person authorized to sign)	15C. DATE SIGNED  7/24/24	16B. UNITED STATES OF AMERICA  JOSEPH GIBBS Digitally signed by JOSEPH GIBBS Date: 2024.07.24 11:59:08 -04'00'  (Signature of Contracting Officer)	16C. DATE SIGNED  JUL 24, 2024

The purpose of Modification P00007 for contract 91990022C0014 REL Southeast is the following:

- Add \$50,000.00 to CLIN 0009 Regional Education Laboratories (REL) Southeast Year 3 Funding (Travel). This modification was a follow-up with Modification P00006 that de-obligated \$50,000.00 from CLIN 0008 (Regional Educational Laboratories (REL) Southeast Year 3 Funding (Non-Travel)).
- The total contract value will be increased by \$50,000.00 from \$27,753,000.00 to \$27,803,000.00.
- The total contract funding will be increased by \$50,000.00 from \$18,267,916.96 to \$18,317,916.96.

Except as provided herein, all other terms and conditions of contract 91990022C0014 remains unchanged and in full force and effect.

**Contractor's Statement of Release**

In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's Revised Delivery Schedule "proposal(s) for adjustment," the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable to such facts or circumstances giving rise to the "proposal(s) for adjustment".

## SCHEDULE Continued

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ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0009	<p>Contracting Officer: Joseph Gibbs, 202-453-7716, Joseph.Gibbs@ed.gov</p> <p>Primary Contracting Officer Representative: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Contracting Officer Representative(s): Nicassia Belton, 202-804-7474, Nicassia.Belton@ed.gov</p> <p>Property Administrator Point of Contact: None</p> <p>Primary Technical Point of Contact: Janelle Sands, 202-245-6786, janelle.sands@ed.gov</p> <p>Alternate Technical Point(s) of Contact: None</p> <p>(Changed Line Item)</p> <p>Regional Educational Laboratories (REL) Southeast Year 3 Funding (Travel)</p> <p>Accounting and Appropriation Data: 1100M2024.B.2024.ER000000.RL2.2550A.000.117. 0000.000000 \$150,000.00</p> <p>Period of Performance: 01/24/2022 to 01/02/2027</p> <p>Pricing Option: Cost-Plus-Fixed-Fee</p>	1.00	SE	150,000.00	150,000.00

ED 003688



UNITED STATES DEPARTMENT OF EDUCATION  
 OFFICE OF FINANCE AND OPERATIONS  
 OFFICE OF ACQUISITION, GRANTS, AND RISK MANAGEMENT

***Determination and Findings to add Funding for Contract 91990022C0014 - REL Southeast P00008***

Contract Number:	91990022C0014 REL Southeast
Period of Performance:	January 3, 2022, through January 2, 2027
Acquisition Plan Tracking Number:	2027
NAICS Code:	611710: Educational Support Services
Funding PR EDOIES-25-000023:	\$2,000,000.00
Contractor:	Florida State University
UEI	JF2BLNN4PJC3
Product and Service Code (PSC):	R499: Support Professional: Other
Service Contract Coding Declaration:	Other Function

**AUTHORITY**

Modification P00008 is executed in accordance with the following contract clauses:  
 Clause 52.243-2 Alternate I: Changes – Cost Reimbursement.

**BACKGROUND**

The Education Sciences Reform Act (ESRA) requires that the Department operate ten Regional Educational Laboratories (REL). The RELs are contracts by law, and the current REL cohort was awarded in December 2021 with effective dates of January 1, 2022. The contracts will end January 2, 2027. The RELs are charged with three primary goals: (1) conduct applied research and development; (2) design and implement training, coaching, and technical support activities that emphasize building capacity to use data and information to drive change; and (3) disseminate scientifically valid research, evidence-based practices, and supporting materials that allow stakeholders to apply this knowledge to their own practice. The current contract cohort was awarded with multiyear authority and is thus funded in annual increments. Additionally, the current contracts were awarded as Cost-Plus Fixed Fee (CPFF) tasks and subtasks. All travel costs are purely cost reimbursable (CR).

**PURPOSE/ DESCRIPTION OF CHANGES**

P00008

The purpose of this modification is the following:

- Incorporate a revised deliverable schedule
- Obligate \$1,900,000.00 to Year 4 of Performance CPFF (Non Travel) CLIN
- Obligate \$100,000.00 to Year 4 of Performance (Travel) CLIN

## **FUNDING**

The total contract value remains \$27,803,000.00.

The total funded value increases by \$2,000,000.00, from \$18,317,916.96 to \$20,317,916.96.

PR EDOIES-25-000023 dated 11/21/24 was provided in the amount of \$2,000,000.00.

## **PERIOD OF PERFORMANCE**

This modification does not affect the period of performance. The period of performance remains January 3, 2022, through January 2, 2027.

## **SYNOPSIS**

There is no requirement for synopsizing this action; Federal Acquisition Regulations (FAR) 5.202(a)(11) – the proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with the requirements of FAR 5.207 - Preparation and transmittal of synopses, with respect to the current proposed contract action.

## **SCOPE OF WORK**

This modification does not affect the scope of work when compared to the original contract. There are no changes that would affect the field of competition nor are these changes that were not reasonably contemplated when the parties entered into the agreement. This modification does not add or subtract fundamental elements of the work originally contracted.

## **RECOMMENDATION**

Based on the forgoing, it is hereby determined that it is in the best interest of the Government to proceed with executing modification P00008, in the amount of \$2,000,000.00.

Recommend:



**X** Niquay Epps

Mrs. Niquay Epps  
Contract Specialist  
Signed by: NIQUAY EPPS

Approve:



**X** Joseph Gibbs

Mr. Joseph Gibbs  
Contracting Officer  
Signed by: Office of Finance and Operations

## AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

CONTRACT DOCUMENT

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2. AMENDMENT/MODIFICATION NO. P00008	3. EFFECTIVE DATE See Block 16C	4. REQUISITION/PURCHASE REQ. NO. EDOIES-25-000023	5. PROJECT NO. (If applicable)
6. ISSUED BY US Department of Education 400 Maryland Avenue SW Washington DC 20202	CODE CAM	7. ADMINISTERED BY (If other than Item 6)	CODE
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) FLORIDA STATE UNIVERSITY (00027876) Attn: No Contact Available 874 TRADITIONS WAY TALLAHASSEE FL 323060001		(x) 9A. AMENDMENT OF SOLICITATION NO.	
		9B. DATED (SEE ITEM 11)	
		x 10A. MODIFICATION OF CONTRACT/ORDER NO. 91990022C0014	
		10B. DATED (SEE ITEM 13) 01/24/2022	
CODE JF2BLNN4PJC3	FACILITY CODE		

## 11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning \_\_\_\_\_ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)  
1100M2025.B.2025.610000.ER000000.RL2.2550A.0.000.117.N.0000.000000.000000

Net Increase: \$2,000,000.00

## 13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
X	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.243-2 Alt I: Changes Cost Reimbursement
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor  is not.  is required to sign this document and return \_\_\_\_\_ copies to the issuing office.

## 14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

UEI: JF2BLNN4PJC3

Period of Performance: 01/24/2022 to 01/02/2027

Change Item 0004 to read as follows (amount shown is the total amount):

Regional Educational Laboratories (REL) Southeast

0004 Year 4 of Performance	4,772,590.57
Incrementally Funded Amount: \$1,900,000.00	

Product/Service Code: R699

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9 A or 10A, as heretofore changed, remains unchanged and in full force and effect.

## 15A. NAME AND TITLE OF SIGNER (Type or print)

Dr. Stacey Patterson, Vice President for Research

15B. CONTRACTOR/OFFEROR  
Rose Driber for Stacey  
Patterson, VPR  
(Signature of person authorized to sign)

Digitally signed by Rose Driber for  
Stacey Patterson, VPR  
Date: 2024.12.19 14:02:44 -05'00'

15C. DATE SIGNED  
12/19/2024

## 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)

Joseph Gibbs

TEL: 202-453-7716

EMAIL: Joseph.Gibbs@ed.gov

16B. UNITED STATES OF AMERICA

JOSEPH GIBBS  
Digitally signed by JOSEPH GIBBS  
Date: 2024.12.19 15:50:25 -05'00'

(Signature of Contracting Officer)

16C. DATE SIGNED

NAME OF OFFEROR OR CONTRACTOR  
FLORIDA STATE UNIVERSITY (00027876)

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
0010	<p>Add Item 0010 as follows:</p> <p>Travel Year 4 Obligated Amount: \$100,000.00 Product/Service Code: R499</p>				100,000.00

### Section A - Solicitation/Contract Form

Summary of Clause Changes:

Clause Modification is incorporated as follows:

#### **Modification Language**

The purpose of modification P00008 for contract 91990022C0014 REL Southeast is to:

- Incorporate a revised deliverable schedule
- Obligate \$1,900,000.00 to Year 4 of Performance CPFF (Non Travel) CLIN
- Obligate \$100,000.00 to Year 4 of Performance (Travel) CLIN

The total contract value remains \$27,803,000.00

The total funded value increases by \$2,000,000.00, from \$18,317,916.96 to \$20,317,916.96

Except as provided herein, all other terms and conditions of contract 91990022C0014 remain unchanged and in full force and effect.

#### **Updated Deliverable Schedule**

SCHEDULE OF DELIVERABLES								
Deliverable #		Deliverable Name	Draft Date Due	Submitted	Approved	Final Date Due	Comments	On-Time?
<b>TASK 1 - REL Management &amp; Reporting</b>								
1.1		Summary of REL Kickoff Meeting						
1.1	.1	Summary of REL Kickoff Meeting	NA	NA	NA	2/21/22		
1.2	.1	Bimonthly call agendas						
1.2	.1	Year 1 February Call 1 Agenda	2/7/22	2/7/22	2/7/22	2/9/22		1
1.2	.1	Year 1 February Call 2 Agenda	2/21/22	2/18/22	2/18/22	2/23/22		1
1.2	.1	Year 1 March Call 1 Agenda	3/7/22	3/4/2022	3/7/2022	3/9/22		1
1.2	.1	Year 1 March Call 2 Agenda	3/21/22	3/21/2022	3/21/2022	3/23/22		1
1.2	.1	Year 1 April Call 1 Agenda	4/4/22	4/4/2022	4/6/2022	4/6/22		1
1.2	.1	Year 1 April Call 2 Agenda	4/18/22	4/18/2022	4/18/2022	4/20/22		1
1.2	.1	Year 1 May Call 1 Agenda	5/2/22	5/2/2022	5/2/2022	5/4/22		1
1.2	.1	Year 1 May Call 2 Agenda	5/16/22	5/13/2022	5/13/2022	5/18/22		1
1.2	.1	Year 1 June Call 1 Agenda	6/6/22	6/6/2022	6/7/2022	6/8/22		1
1.2	.1	Year 1 June Call 2 Agenda	6/20/22	6/17/2022	6/17/2022	6/22/22		1
1.2	.1	Year 1 July Call 1 Agenda	7/11/22	7/8/2022	7/11/2022	7/13/22		1
1.2	.1	Year 1 July Call 2 Agenda	7/25/22	7/22/2022	7/22/2022	7/27/22		1
1.2	.1	Year 1 August Call 1 Agenda	8/8/22	8/8/2022	8/8/2022	8/10/22		1

1	2	.1	.14	Year 1 August Call 2 Agenda	8/22/22	8/19/2022	8/22/2022	8/24/22		1
1	2	.1	.15	Year 1 September Call 1 Agenda	9/2/22	9/2/2022	9/2/2022	9/4/22		1
1	2	.1	.16	Year 1 September Call 2 Agenda	9/19/22			9/21/22	Call was cancelled.	
1	2	.1	.17	Year 1 October Call 1 Agenda	10/3/22	10/3/2022	10/3/2022	10/5/22		1
1	2	.1	.18	Year 1 October Call 2 Agenda	10/17/22	10/16/2022	10/19/2022	10/19/22		1
1	2	.1	.19	Year 1 November Call 1 Agenda	10/31/22	10/31/2022		11/2/22		1
1	2	.1	.20	Year 1 November Call 2 Agenda	11/14/22	11/10/2022	11/14/2022	11/16/22		1
1	2	.1	.21	Year 1 December Call 1 Agenda	12/5/22	12/5/2022	12/5/2022	12/7/22		1
1	2	.1	.22	Year 1 December Call 2 Agenda	12/19/22	12/15/2022	12/30/2022	12/21/22		1
1	2	.1	.23	Year 2 January Call 1 Agenda	1/9/23	1/9/2023	1/9/2023	1/11/23		1
1	2	.1	.24	Year 2 January Call 2 Agenda	1/23/23	1/23/2023	1/23/2023	1/25/23		1
1	2	.1	.25	Year 2 February Call 1 Agenda	2/6/23	2/6/2023	2/7/2023	2/8/23		1
1	2	.1	.26	Year 2 February Call 2 Agenda	2/20/23	2/17/2023	2/17/2023	2/22/23		1
1	2	.1	.27	Year 2 March Call 1 Agenda	3/6/23	3/6/2023	3/6/2023	3/8/23		1
1	2	.1	.28	Year 2 March Call 2 Agenda	3/20/23	3/17/2023	3/21/2023	3/22/23		1
1	2	.1	.29	Year 2 April Call 1 Agenda	4/3/23	4/3/2023	4/4/2023	4/5/23		1
1	2	.1	.30	Year 2 April Call 2 Agenda	4/17/23	4/14/2023	4/17/2023	4/19/23		1
1	2	.1	.31	Year 2 May Call 1 Agenda	5/1/23	5/1/2023	5/1/2023	5/3/23		1
1	2	.1	.32	Year 2 May Call 2 Agenda	5/15/23	5/12/2023	5/15/2023	5/17/23		1
1	2	.1	.33	Year 2 June Call 1 Agenda	6/5/23	6/2/2023	6/5/2023	6/7/23		1
1	2	.1	.34	Year 2 June Call 2 Agenda	6/19/23	6/16/2023	6/20/2023	6/21/23		1
1	2	.1	.35	Year 2 July Call 1 Agenda	7/10/23	7/7/2023	7/10/2023	7/12/23		1
1	2	.1	.36	Year 2 July Call 2 Agenda	7/24/23	7/21/2023	7/24/2023	7/26/23		1
1	2	.1	.37	Year 2 August Call 1 Agenda	8/7/23	8/4/2023	8/8/2023	8/9/23		1
1	2	.1	.38	Year 2 August Call 2 Agenda	8/21/23	8/18/2023	8/21/2023	8/23/23		1
1	2	.1	.39	Year 2 September Call 1 Agenda	9/4/23	9/5/2023	9/5/2023	9/6/23		0
1	2	.1	.40	Year 2 September Call 2 Agenda	9/18/23	9/15/2023	9/20/2023	9/20/23		1
1	2	.1	.41	Year 2 October Call 1 Agenda	10/2/23	9/29/2023	10/3/2023	10/4/23		1
1	2	.1	.42	Year 2 October Call 2 Agenda	10/16/23	10/13/2023	10/13/2023	10/18/23		1
1	2	.1	.43	Year 2 November Call 1 Agenda	10/30/23	10/27/2023	10/30/2023	11/1/23		1
1	2	.1	.44	Year 2 November Call 2 Agenda	11/13/23	11/7/2023	11/9/2023	11/15/23		1
1	2	.1	.45	Year 2 December Call 1 Agenda	12/4/23	12/1/2023	12/4/2023	12/6/23		1
1	2	.1	.46	Year 2 December Call 2 Agenda	12/18/23			12/20/23	Call cancelled	1
1	2	.1	.47	Year 3 January Call 1 Agenda	1/8/24	1/4/2024	1/5/2024	1/10/24		1

1	1	2	1	1	1	48	Year 3 January Call 2 Agenda	1/22/24	1/19/2024	1/22/2024	1/24/24			1
1	1	2	1	1	1	49	Year 3 February Call 1 Agenda	2/5/24	2/5/2024	2/5/2024	2/7/24			1
1	1	2	1	1	1	50	Year 3 February Call 2 Agenda	2/19/24	2/16/2024	2/20/2024	2/21/24			1
1	1	2	1	1	1	51	Year 3 March Call 1 Agenda	3/4/24	3/4/2024	3/5/2024	3/6/24			1
1	1	2	1	1	1	52	Year 3 March Call 2 Agenda	3/18/24	3/14/2024	3/14/2024	3/20/24			1
1	1	2	1	1	1	53	Year 3 April Call 1 Agenda	4/1/24	3/29/2024	4/9/2024	4/3/24			1
1	1	2	1	1	1	54	Year 3 April Call 2 Agenda	4/15/24	4/11/2024	4/12/2024	4/17/24			1
1	1	2	1	1	1	55	Year 3 May Call 1 Agenda	5/6/24	5/16/2024	5/20/2024	5/8/24			0
1	1	2	1	1	1	56	Year 3 May Call 2 Agenda	5/20/24			5/22/24	Cancelled		
1	1	2	1	1	1	57	Year 3 June Call 1 Agenda	6/3/24	5/31/2024	5/31/2024	6/5/24			1
1	1	2	1	1	1	58	Year 3 June Call 2 Agenda	6/17/24	6/14/2024	6/14/2024	6/19/24			1
1	1	2	1	1	1	59	Year 3 July Call 1 Agenda	7/8/24	7/8/2024	7/12/2024	7/10/24			1
1	1	2	1	1	1	60	Year 3 July Call 2 Agenda	7/22/24	7/19/2024	7/22/2024	7/24/24			1
1	1	2	1	1	1	61	Year 3 August Call 1 Agenda	8/5/24	8/2/2024	8/2/2024	8/7/24			1
1	1	2	1	1	1	62	Year 3 August Call 2 Agenda	8/19/24	8/16/2024	8/16/2024	8/21/24			1
1	1	2	1	1	1	63	Year 3 September Call 1 Agenda	9/2/24	8/29/2024	8/29/2024	9/4/24			1
1	1	2	1	1	1	64	Year 3 September Call 2 Agenda	9/16/24	9/13/2024	9/16/2024	9/18/24			1
1	1	2	1	1	1	65	Year 3 October Call 1 Agenda	10/7/24	10/7/2024	10/8/2024	10/9/24			1
1	1	2	1	1	1	66	Year 3 October Call 2 Agenda	10/21/24			10/23/24			
1	1	2	1	1	1	67	Year 3 November Call 1 Agenda	11/5/24			11/7/24			
1	1	2	1	1	1	68	Year 3 November Call 2 Agenda	11/19/24			11/21/24			
1	1	2	1	1	1	69	Year 3 December Call 1 Agenda	12/2/24			12/4/24			
1	1	2	1	1	1	70	Year 3 December Call 2 Agenda	12/16/24			12/18/24			
1	1	2	1	1	1	71	Year 4 January Call 1 Agenda	1/6/25			1/8/25			
1	1	2	1	1	1	72	Year 4 January Call 2 Agenda	1/20/25			1/22/25			
1	1	2	1	1	1	73	Year 4 February Call 1 Agenda	2/3/25			2/5/25			
1	1	2	1	1	1	74	Year 4 February Call 2 Agenda	2/17/25			2/19/25			
1	1	2	1	1	1	75	Year 4 March Call 1 Agenda	3/3/25			3/5/25			
1	1	2	1	1	1	76	Year 4 March Call 2 Agenda	3/17/25			3/19/25			
1	1	2	1	1	1	77	Year 4 April Call 1 Agenda	3/31/35			4/2/35			
1	1	2	1	1	1	78	Year 4 April Call 2 Agenda	4/14/25			4/16/25			
1	1	2	1	1	1	79	Year 4 May Call 1 Agenda	5/5/25			5/7/25			
1	1	2	1	1	1	80	Year 4 May Call 2 Agenda	5/19/25			5/21/25			
1	1	2	2				Bimonthly call memos							
1	1	2	2	1			Year 1 February Call 1	2/16/22	2/11/2022	2/11/2022	2/23/22			1
1	1	2	2	2			Year 1 February Call 2	3/2/22	2/28/2022	3/2/2022	3/9/22			1
1	1	2	2	3			Year 1 March Call 1	3/16/22	3/15/2022	3/18/2022	3/23/22			1
1	1	2	2	4			Year 1 March Call 2	3/30/22	3/25/2022	4/1/2022	4/6/22			1

1	1	2	.2	.5	Year 1 April Call 1	4/13/22	4/11/2022	4/15/2022	4/20/22		1
1	1	2	.2	.6	Year 1 April Call 2	4/27/22	4/27/2022	4/29/2022	5/4/22		1
1	1	2	.2	.7	Year 1 May Call 1	5/11/22	5/6/2022	5/13/2022	5/18/22		1
1	1	2	.2	.8	Year 1 May Call 2	5/25/22	5/23/2022	5/26/2022	6/1/22		1
1	1	2	.2	.9	Year 1 June Call 1	6/15/22	6/14/2022	6/22/2022	6/22/22		1
1	1	2	.2	.10	Year 1 June Call 2	6/29/22	6/24/2022	6/30/2022	7/6/22		1
1	1	2	.2	.11	Year 1 July Call 1	7/20/22	7/20/2022	7/20/2022	7/27/22		1
1	1	2	.2	.12	Year 1 July Call 2	8/3/22	8/1/2022	8/3/2022	8/10/22		1
1	1	2	.2	.13	Year 1 August Call 1	8/17/22	8/17/2022	8/24/2022	8/24/22		1
1	1	2	.2	.14	Year 1 August Call 2	8/31/22	8/29/2022	8/31/2022	9/7/22		1
1	1	2	.2	.15	Year 1 September Call 1	9/14/22	9/12/2022	9/15/2022	9/21/22		1
1	1	2	.2	.16	Year 1 September Call 2	9/28/22			10/5/22	Call 1.2.2.16 was cancelled	1
1	1	2	.2	.17	Year 1 October Call 1	10/12/22	10/5/2022	10/14/2022	10/19/22		1
1	1	2	.2	.18	Year 1 October Call 2	10/26/22	10/21/2022	10/26/2022	11/2/22		1
1	1	2	.2	.19	Year 1 November Call 1	11/9/22	11/7/2022	11/16/2022	11/16/22		1
1	1	2	.2	.20	Year 1 November Call 2	11/23/22	11/18/2022	11/28/2022	11/30/22		1
1	1	2	.2	.21	Year 1 December Call 1	12/14/22	12/9/2022	12/20/2022	12/21/22		1
1	1	2	.2	.22	Year 1 December Call 2	12/23/22	12/16/2022	12/30/2022	12/30/22		1
1	1	2	.2	.23	Year 2 January Call 1	1/18/23	1/13/2023	1/23/2023	1/25/23		1
1	1	2	.2	.24	Year 2 January Call 2	2/1/23	1/30/2023	2/7/2023	2/8/23		1
1	1	2	.2	.25	Year 2 February Call 1	2/15/23	2/13/2023	2/21/2023	2/22/23		1
1	1	2	.2	.26	Year 2 February Call 2	3/1/23	3/1/2023	3/8/2023	3/8/23		1
1	1	2	.2	.27	Year 2 March Call 1	3/15/23	3/14/2023	3/28/2023	3/22/23		1
1	1	2	.2	.28	Year 2 March Call 2	3/29/23	3/27/2023	4/4/2023	4/5/23		1
1	1	2	.2	.29	Year 2 April Call 1	4/12/23	4/10/2023	4/17/2023	4/19/23		1
1	1	2	.2	.30	Year 2 April Call 2	4/26/23	4/21/2023	4/30/2023	5/3/23		1
1	1	2	.2	.31	Year 2 May Call 1	5/10/23	5/8/2023	5/16/2023	5/17/23		1
1	1	2	.2	.32	Year 2 May Call 2	5/24/23	5/22/2023	6/1/2023	5/31/23		1
1	1	2	.2	.33	Year 2 June Call 1	6/14/23	6/8/2023	6/14/2023	6/21/23		1
1	1	2	.2	.34	Year 2 June Call 2	6/28/23	6/23/2023	7/5/2023	7/5/23		1
1	1	2	.2	.35	Year 2 July Call 1	7/19/23	7/14/2023	7/19/2023	7/26/23		1
1	1	2	.2	.36	Year 2 July Call 2	8/2/23	7/31/2023	8/10/2023	8/9/23		1
1	1	2	.2	.37	Year 2 August Call 1	8/16/23	8/15/2023	8/18/2023	8/23/23		1
1	1	2	.2	.38	Year 2 August Call 2	8/30/23	8/29/2023	09/07/223	9/6/23		1
1	1	2	.2	.39	Year 2 September Call 1	9/13/23	9/8/2023	9/15/2023	9/20/23		1
1	1	2	.2	.40	Year 2 September Call 2	9/27/23	9/22/2023	10/2/2023	10/4/23		1
1	1	2	.2	.41	Year 2 October Call 1	10/11/23	10/10/2023	10/19/2023	10/18/23		1
1	1	2	.2	.42	Year 2 October Call 2	10/25/23			11/1/23	Didn't have this call because of GB.	1
1	1	2	.2	.43	Year 2 November Call 1	11/8/23	11/6/2023	11/13/2023	11/15/23		1
1	1	2	.2	.44	Year 2 November Call 2	11/22/23	11/20/2023	11/22/2023	12/6/23		1

1	1	2	2	45	Year 2 December Call 1	12/13/23	12/7/2023	12/14/2023	12/20/23		1
1	1	2	2	46	Year 2 December Call 2	12/22/23			12/29/23	Cancelled	1
1	1	2	2	47	Year 3 January Call 1	1/17/24	1/16/2024	1/22/2024	12/30/23		1
1	1	2	2	48	Year 3 January Call 2	1/31/24	1/29/2024	2/5/2024	12/31/23		1
1	1	2	2	49	Year 3 February Call 1	2/14/24	2/14/2024		1/1/24		1
1	1	2	2	50	Year 3 February Call 2	2/28/24	2/29/2024	3/6/2024	1/2/24		0
1	1	2	2	51	Year 3 March Call 1	3/13/24	3/22/2024	4/7/2024	3/20/24		0
1	1	2	2	52	Year 3 March Call 2	3/27/24	3/22/2024	4/7/2024	4/3/24		1
1	1	2	2	53	Year 3 April Call 1	4/10/24	4/5/2024	4/16/2024	4/17/24		1
1	1	2	2	54	Year 3 April Call 2	4/24/24	4/24/2024	5/1/2024	5/1/24		1
1	1	2	2	55	Year 3 May Call 1	5/15/24	5/16/2024	5/20/2024	5/22/24		0
1	1	2	2	56	Year 3 May Call 2	5/29/24			6/5/24	Cancelled	
1	1	2	2	57	Year 3 June Call 1	6/12/24	6/11/2024	6/17/2024	6/19/24		1
1	1	2	2	58	Year 3 June Call 2	6/26/24	6/25/2024	7/12/2024	7/3/24		1
1	1	2	2	59	Year 3 July Call 1	7/17/24	7/11/2024	7/12/2024	7/24/24		1
1	1	2	2	60	Year 3 July Call 2	7/31/24	7/31/2024	8/9/2024	8/7/24		1
1	1	2	2	61	Year 3 August Call 1	8/14/24	8/13/2024	8/22/2024	8/21/24		1
1	1	2	2	62	Year 3 August Call 2	8/28/24	8/26/2024	8/28/2024	9/4/24		1
1	1	2	2	63	Year 3 September Call 1	9/11/24	9/10/2024	10/1/2024	9/18/24		1
1	1	2	2	64	Year 3 September Call 2	9/25/24	9/24/2024	10/1/2024	10/4/23		1
1	1	2	2	65	Year 3 October Call 1	10/16/24			10/18/23		
1	1	2	2	66	Year 3 October Call 2	10/30/24			11/1/23		
1	1	2	2	67	Year 3 November Call 1	11/14/24			11/15/23		
1	1	2	2	68	Year 3 November Call 2	11/28/24			12/6/23		
1	1	2	2	69	Year 3 December Call 1	12/11/24			12/20/23		
1	1	2	2	70	Year 3 December Call 2	12/20/24			12/29/23		
1	1	2	2	71	Year 4 January Call 1	1/15/25					
1	1	2	2	72	Year 4 January Call 2	1/29/25					
1	1	2	2	73	Year 4 February Call 1	2/12/25					
1	1	2	2	74	Year 4 February Call 2	2/26/25					
1	1	2	2	75	Year 4 March Call 1	3/12/25					
1	1	2	2	76	Year 4 March Call 2	3/26/25					
1	1	2	2	77	Year 4 April Call 1	4/9/25					
1	1	2	2	78	Year 4 April Call 2	4/23/25					
1	1	2	2	79	Year 4 May Call 1	5/14/25					
1	1	2	2	80	Year 4 May Call 2	5/28/25					
1	4				Department presentation briefing materials						
1	4				Department presentation briefing materials - Year 3 first meeting	3 weeks before each meeting	12/15/2023	12/15/2023	1/3/24		1
1	4				Summary of department presentation - Year 3 first	3 weeks before each					

			meeting	meeting						
1.4	.1	.3	Summary of department presentation - Year 3 second meeting	3 weeks before each meeting						
1.4	.1	.4	Summary of department presentation - Year 3 second meeting	1 week after each meeting						
1.5			Identify, establish, maintain and convene the Governing Board							
1.5	.1	.1	Report of the Establishment of the Governing Board	5 weeks after award	2/24/2022	2/28/2022	2/28/2022			1
1.5	.2	.1	Agenda and materials for Governing Board meeting - Year 1 Spring Governing Board meeting	2/11/22	2/11/2022	3/4/2022	3/4/2022			1
1.5	.3	.1	Meeting minutes and action items - Year 1 Spring Governing Board meeting	3/21/22	3/21/2022	3/30/2022	4/4/2022			1
1.5	.2	.2	Agenda and materials for Governing Board meeting - Year 1 Fall Governing Board meeting	3 weeks before meeting	9/16/2022	9/29/2022				
1.5	.3	.2	Meeting minutes and action items - Year 1 Fall Governing Board meeting	10/24/22	10/21/2022	10/26/2022				
1.5	.2	.3	Agenda and materials for Governing Board meeting - Year 2 Spring Governing Board meeting	3 weeks before meeting	4/3/2023	4/18/2023				
1.5	.3	.3	Meeting minutes and action items - Year 2 Spring Governing Board meeting	2 weeks after meeting	5/3/2023	5/15/2023				
1.5	.2	.4	Agenda and materials for Governing Board meeting - Year 2 Fall Governing Board meeting	3 weeks before meeting	9/21/2023	9/26/2023				
1.5	.3	.4	Meeting minutes and action items - Year 2 Fall Governing Board meeting	2 weeks after meeting	10/26/2023	10/30/2023				
1.5	.2	.5	Agenda and materials for Governing Board meeting - Year 3 Spring Governing Board meeting	3 weeks before meeting	4/8/2024					
1.5	.3	.5	Meeting minutes and action items - Year 3 Spring Governing Board meeting	2 weeks after meeting	5/15/2024	5/23/2024				
1.5	.2	.6	Agenda and materials for Governing Board meeting - Year 3 Fall Governing Board meeting	3 weeks before meeting	9/24/2024					

1.5	.3	.6	Meeting minutes and action items - Year 3 Fall Governing Board meeting	2 weeks after meeting					
1.5	.2	.7	Agenda and materials for Governing Board meeting - Year 4 Spring Governing Board meeting	3 weeks before meeting					
1.5	.3	.7	Meeting minutes and action items - Year 4 Spring Governing Board meeting	2 weeks after meeting					
1.5	.2	.8	Agenda and materials for Governing Board meeting - Year 4 Fall Governing Board meeting	3 weeks before meeting					
1.5	.3	.8	Meeting minutes and action items - Year 4 Fall Governing Board meeting	2 weeks after meeting					
1.6			Bi-Annual Assessment of Progress Report						
1.6	.1	.1	Memo: Bi-Annual Assessment of Progress	4/15/22	5/2/2022	5/11/2022	5/15/2022		0
1.6	.1	.2	Bi-Annual Assessment of Progress Report	12/1/22	11/30/2022	1/4/2023	12/31/2022		1
1.6	.1	.3	Bi-Annual Assessment of Progress Report	6/16/23	6/16/2023	7/7/2023	7/16/2023	Original due date was 06/01/2023. Approved by Janelle via email on 05/31/2023.	1
1.6	.1	.4	Bi-Annual Assessment of Progress Report	12/1/23	12/1/2023	3/25/2024	12/31/2023		1
1.6	.1	.5	Bi-Annual Assessment of Progress Report	6/3/24	5/31/2024	7/12/2024	7/3/2024		1
1.6	.1	.6	Bi-Annual Assessment of Progress Report	12/2/24			1/1/2025		
1.6	.1	.7	Bi-Annual Assessment of Progress Report	6/1/25			7/1/2025		
1.6	.1	.8	Bi-Annual Assessment of Progress Report	12/1/25			12/31/2025		
1.7			Monthly Progress Report						
1.7	.1	.1	Year 1 February Monthly Progress Report	3/15/22	3/11/2022	3/16/2022	3/29/2022		1
1.7	.1	.2	Year 1 March Monthly Progress Report	4/15/22	4/15/2022	4/18/2022	4/29/2022		1
1.7	.1	.3	Year 1 April Monthly Progress Report	5/16/22	5/13/2022	5/17/2022	5/30/2022		1
1.7	.1	.4	Year 1 May Monthly Progress Report	6/15/22	6/15/2022	6/21/2022	6/29/2022		1
1.7	.1	.5	Year 1 June Monthly Progress Report	7/18/22	7/18/2022	7/18/2022	8/1/2022		1

1.7	.1	.6		Year 1 July Monthly Progress Report	8/15/22	8/11/2022	8/22/2022	8/29/2022		1
1.7	.1	.7		Year 1 August Monthly Progress Report	9/16/22	9/16/2022	9/26/2022	9/30/2022		1
1.7	.1	.8		Year 1 September Monthly Progress Report	10/17/22	10/17/2022	10/20/2022	10/31/2022		1
1.7	.1	.9		Year 1 October Monthly Progress Report	11/15/22	11/16/2022	11/19/2022	11/29/2022		0
1.7	.1	.10		Year 1 November Monthly Progress Report	12/15/22	12/14/2022	1/31/2023	12/29/2022		1
1.7	.1	.11		Year 1 December Monthly Progress Report	1/16/23	1/17/2023	2/16/2023	1/30/2023		0
1.7	.1	.12		Year 2 January Monthly Progress Report	2/15/23	2/15/2023	2/23/2023	3/1/2023		1
1.7	.1	.13		Year 2 February Monthly Progress Report	3/15/23	3/13/2023	3/21/2023	3/29/2023		1
1.7	.1	.14		Year 2 March Monthly Progress Report	4/17/23	4/11/2023	4/14/2023	5/1/2023		1
1.7	.1	.15		Year 2 April Monthly Progress Report	5/15/23	5/11/2023	5/17/2023	5/29/2023		1
1.7	.1	.16		Year 2 May Monthly Progress Report	6/15/23	6/15/2023	6/22/2023	6/29/2023		1
1.7	.1	.17		Year 2 June Monthly Progress Report	7/18/23	7/13/2023	7/18/2023	8/1/2023		1
1.7	.1	.18		Year 2 July Monthly Progress Report	8/15/23	8/15/2023	8/18/2023	8/29/2023		1
1.7	.1	.19		Year 2 August Monthly Progress Report	9/15/23	9/14/2023	9/22/2023	9/29/2023		1
1.7	.1	.20		Year 2 September Monthly Progress Report	10/16/23	10/13/2023	10/20/2023	10/30/2023		1
1.7	.1	.21		Year 2 October Monthly Progress Report	11/15/23	11/14/2023	11/20/2023	11/29/2023		1
1.7	.1	.22		Year 2 November Monthly Progress Report	12/15/23	12/14/2023	12/20/2023	12/29/2023		1
1.7	.1	.23		Year 2 December Monthly Progress Report	1/17/24	1/16/2024	1/31/2024	1/31/2024		1
1.7	.1	.24		Year 3 January Monthly Progress Report	2/15/24	2/15/2024	3/13/2024	2/29/2024		1
1.7	.1	.25		Year 3 February Monthly Progress Report	3/15/24	3/14/2024	3/25/2024	3/29/2024		1
1.7	.1	.26		Year 3 March Monthly Progress Report	4/15/24	4/15/2024	4/23/2024	4/29/2024		1
1.7	.1	.27		Year 3 April Monthly Progress Report	5/15/24	5/15/2024	5/22/2024	5/29/2024		1
1.7	.1	.28		Year 3 May Monthly Progress Report	6/17/24	6/13/2024	6/17/2024	7/1/2024		1
1.7	.1	.29		Year 3 June Monthly Progress Report	7/16/24	7/15/2024	7/22/2024	7/30/2024		1
1.7	.1	.30		Year 3 July Monthly Progress Report	8/15/24	8/14/2024	9/3/2024	8/29/2024		1
1.7	.1	.31		Year 3 August Monthly	9/17/24	9/17/2024	9/23/2024	10/1/2024		1

				Progress Report						
1.7	.1	.32		Year 3 September Monthly Progress Report	10/15/24				10/29/2024	
1.7	.1	.33		Year 3 October Monthly Progress Report	11/15/24				11/29/2024	
1.7	.1	.34		Year 3 November Monthly Progress Report	12/16/24				12/30/2024	
1.7	.1	.35		Year 3 December Monthly Progress Report	1/16/25				1/30/2025	
1.7	.1	.36		Year 4 January Monthly Progress Report	2/17/25				3/3/2025	
1.7	.1	.37		Year 4 February Monthly Progress Report	3/17/25				3/31/2025	
1.7	.1	.38		Year 4 March Monthly Progress Report	4/15/25				4/29/2025	
1.7	.1	.39		Year 4 April Monthly Progress Report	5/15/25				5/29/2025	
1.7	.1	.40		Year 4 May Monthly Progress Report	6/16/25				6/30/2025	
1.7	.1	.41		Year 4 June Monthly Progress Report	7/15/25					
1.8				Performance reporting						
1.8	.1	.1		Performance report 1	Upon request					
1.8	.1	.2		Performance report 2	Upon request					
1.8	.1	.3		Performance report 3	Upon request					
1.8	.1	.4		Performance report 4	Upon request					
1.8	.1	.5		Performance report 5	Upon request					
1.8	.1	.6		Performance report 6	Upon request					
1.8	.1	.7		Performance report 7	Upon request					
1.9				Submission of security documents for low and moderate level clearances						
1.9	.1	.1		Submission of security documents for low and moderate level clearances	As needed					
1.10				REL evaluation materials						
1.10	.1	.1		REL evaluation materials	TBD					
TASK 2 - Coordination & Collaboration										
2.1				Lead cross-REL coordination activities						
2.1	.1	.1	.a	Foundational Literacy Cross-REL working group agenda #1	2 weeks before meeting	5/6/2022	5/13/2022			1

2.1	.2	.1	.a	Foundational Literacy Cross-REL working group memo #1	2 weeks after meeting	5/23/2022	5/25/2022				1
2.1	.1	.2	.a	Foundational Literacy Cross-REL working group agenda #2	2 weeks before meeting	8/10/2022	8/10/2022				1
2.1	.2	.2	.a	Foundational Literacy Cross-REL working group memo #2	2 weeks after meeting	8/26/2022	8/31/2022				1
2.1	.1	.3	.a	Foundational Literacy Cross-REL working group agenda #3	2 weeks before meeting	10/16/2022	10/20/2022				1
2.1	.2	.3	.a	Foundational Literacy Cross-REL working group memo #3	2 weeks after meeting	11/15/2022	11/19/2022				1
2.1	.1	.4	.a	Foundational Literacy Cross-REL working group agenda #4	2 weeks before meeting	1/19/2023	1/23/2023				1
2.1	.2	.4	.a	Foundational Literacy Cross-REL working group memo #4	2 weeks after meeting	2/14/2023	2/21/2023				1
2.1	.1	.5	.a	Foundational Literacy Cross-REL working group agenda #5	2 weeks before meeting	4/21/2023	4/30/2023				1
2.1	.2	.5	.a	Foundational Literacy Cross-REL working group memo #5	2 weeks after meeting	5/19/2023	5/19/2023				1
2.1	.1	.6	.a	Foundational Literacy Cross-REL working group agenda #6	2 weeks before meeting	7/7/2023	7/10/2023				1
2.1	.2	.6	.a	Foundational Literacy Cross-REL working group memo #6	2 weeks after meeting	8/15/2023	08/18/2023				1
2.1	.1	.7	.a	Foundational Literacy Cross-REL working group agenda #7	2 weeks before meeting	10/20/2023	10/24/2023				1
2.1	.2	.7	.a	Foundational Literacy Cross-REL working group memo #7	2 weeks after meeting	11/13/2023	11/16/2023				1
2.1	.1	.8	.a	Foundational Literacy Cross-REL working group agenda #8	2 weeks before meeting	1/17/2024	1/23/2024				1
2.1	.2	.8	.a	Foundational Literacy Cross-REL working group memo #8	2 weeks after meeting	2/12/2024	2/20/2024				1
2.1	.1	.9	.a	Foundational Literacy Cross-REL working group agenda #9	2 weeks before meeting	4/24/2024	4/26/2024				1
2.1	.2	.9	.a	Foundational Literacy Cross-REL working group memo #9	2 weeks after meeting	5/13/2024	5/23/2024				1

2.1	.1	.10.a	Foundational Literacy Cross-REL working group agenda #10	2 weeks before meeting	7/15/2024	7/16/2024				1
2.1	.2	.10.a	Foundational Literacy Cross-REL working group memo #10	2 weeks after meeting	8/8/2024	8/21/2024				1
2.1	.1	.11.a	Foundational Literacy Cross-REL working group agenda #11	2 weeks before meeting						
2.1	.2	.11.a	Foundational Literacy Cross-REL working group memo #11	2 weeks after meeting						
2.1	.1	.12.a	Foundational Literacy Cross-REL working group agenda #12	2 weeks before meeting						
2.1	.2	.12.a	Foundational Literacy Cross-REL working group agenda #12	2 weeks after meeting						
2.1	.1	.1.b	Toolkit Development Cross-REL working group agenda #1	2 weeks before meeting	5/5/2022	5/5/2022				1
2.1	.2	.1.b	Toolkit Development Cross-REL working group memo #1	2 weeks after meeting	5/11/2022	5/16/2022				1
2.1	.1	.2.b	Toolkit Development Cross-REL working group agenda #2	2 weeks before meeting	5/31/2022	5/31/2022				1
2.1	.2	.2.b	Toolkit Development Cross-REL working group memo #2	2 weeks after meeting	6/16/2022	6/22/2022				1
2.1	.1	.3.b	Toolkit Development Cross-REL working group agenda #3	2 weeks before meeting	7/18/2022	7/20/2022				1
2.1	.2	.3.b	Toolkit Development Cross-REL working group memo #3	2 weeks after meeting	7/27/2022	7/28/2022				1
2.1	.1	.4.b	Toolkit Development Cross-REL working group agenda #4	2 weeks before meeting	8/9/2022	8/9/2022				1
2.1	.2	.4.b	Toolkit Development Cross-REL working group memo #4	2 weeks after meeting	8/24/2022	8/26/2022				1
2.1	.1	.5.b	Toolkit Development Cross-REL working group agenda #5	2 weeks before meeting	9/2/2022	9/7/2022				1
2.1	.2	.5.b	Toolkit Development Cross-REL working group memo #5	2 weeks after meeting	9/28/2022	10/12/2022				1
2.1	.1	.6.b	Toolkit Development Cross-REL working group agenda #6	2 weeks before meeting	10/16/2022	10/19/2022				1

2.1	.2	.6	.b	Toolkit Development Cross-REL working group memo #6	2 weeks after meeting	10/26/2022	10/31/2022				1
2.1	.1	.7	.b	Toolkit Development Cross-REL working group agenda #7	2 weeks before meeting	11/2/2022	11/8/2022				1
2.1	.2	.7	.b	Toolkit Development Cross-REL working group memo #7	2 weeks after meeting	12/6/2022	12/15/2022				1
2.1	.1	.8	.b	Toolkit Development Cross-REL working group agenda #8	2 weeks before meeting	12/13/2022	12/28/2022				1
2.1	.2	.8	.b	Toolkit Development Cross-REL working group memo #8	2 weeks after meeting	1/12/2023	1/23/2023				1
2.1	.1	.9	.b	Toolkit Development Cross-REL working group agenda #9	2 weeks before meeting	1/30/2023	2/3/2023				1
2.1	.2	.9	.b	Toolkit Development Cross-REL working group memo #9	2 weeks after meeting	2/21/2023	3/2/2023				1
2.1	.1	.10	.b	Toolkit Development Cross-REL working group agenda #10	2 weeks before meeting	3/3/2023	3/10/2023				1
2.1	.2	.10	.b	Toolkit Development Cross-REL working group memo #10	2 weeks after meeting	3/21/2023	3/28/2023				1
2.1	.1	.11	.b	Toolkit Development Cross-REL working group agenda #11	2 weeks before meeting	4/3/2023	4/4/2023				1
2.1	.2	.11	.b	Toolkit Development Cross-REL working group memo #11	2 weeks after meeting	4/12/2023	4/18/2023				1
2.1	.1	.12	.b	Toolkit Development Cross-REL working group agenda #12	2 weeks before meeting	5/31/2023	6/1/2023				1
2.1	.2	.12	.b	Toolkit Development Cross-REL working group memo #12	2 weeks after meeting	6/14/2023	6/15/2023				1
2.1	.1	.13	.b	Toolkit Development Cross-REL working group agenda #13	2 weeks before meeting	6/27/2023	7/7/2023				1
2.1	.2	.13	.b	Toolkit Development Cross-REL working group memo #13	2 weeks after meeting	7/12/2023	7/12/2023				1
2.1	.1	.14	.b	Toolkit Development Cross-REL working group agenda #14	2 weeks before meeting	7/31/2023	8/8/2023				1
2.1	.2	.14	.b	Toolkit Development Cross-REL working group memo #14	2 weeks after meeting	8/9/2023	8/11/2023				1

2.1	.1	.15.b	Toolkit Development Cross-REL working group agenda #15	2 weeks before meeting	9/6/2023	9/6/2023				1
2.1	.2	.15.b	Toolkit Development Cross-REL working group memo #15	2 weeks after meeting	9/13/2023	9/18/2023				1
2.1	.1	.16.b	Toolkit Development Cross-REL working group agenda #16	2 weeks before meeting	10/3/2023	10/3/2023				1
2.1	.2	.16.b	Toolkit Development Cross-REL working group memo #16	2 weeks after meeting	10/11/2023	10/19/2023				1
2.1	.1	.17.b	Toolkit Development Cross-REL working group agenda #17	2 weeks before meeting	11/2/2023	11/3/2023				1
2.1	.2	.17.b	Toolkit Development Cross-REL working group memo #17	2 weeks after meeting	11/17/2023	11/20/2023				1
2.1	.1	.18.b	Toolkit Development Cross-REL working group agenda #18	2 weeks before meeting	11/27/2023	11/27/2023				1
2.1	.2	.18.b	Toolkit Development Cross-REL working group memo #18	2 weeks after meeting	12/15/2023	1/3/2024				1
2.1	.1	.19.b	Toolkit Development Cross-REL working group agenda #19	2 weeks before meeting	1/10/2024	1/11/2024				1
2.1	.2	.19.b	Toolkit Development Cross-REL working group memo #19	2 weeks after meeting	1/18/2024	1/23/2024				1
2.1	.1	.20.b	Toolkit Development Cross-REL working group agenda #20	2 weeks before meeting	3/8/2024	3/11/2024				1
2.1	.2	.20.b	Toolkit Development Cross-REL working group memo #20	2 weeks after meeting	3/20/2024	4/7/2024				
2.1	.1	.21.b	Toolkit Development Cross-REL working group agenda #21	2 weeks before meeting	5/10/2024	5/10/2024				
2.1	.2	.21.b	Toolkit Development Cross-REL working group memo #21	2 weeks after meeting	5/22/2024	5/24/2024				
2.1	.1	.22.b	Toolkit Development Cross-REL working group agenda #22	2 weeks before meeting	8/28/2024	8/29/2024				
2.1	.2	.22.b	Toolkit Development Cross-REL working group memo #22	2 weeks after meeting	9/18/2024	9/25/2024				
2.1	.1	.23.b	Toolkit Development Cross-REL working group agenda #23	2 weeks before meeting						

2.1	.2	.23.b	Toolkit Development Cross-REL working group memo #23	2 weeks after meeting					
2.1	.1	.24.b	Toolkit Development Cross-REL working group agenda #24	2 weeks before meeting					
2.1	.2	.24.b	Toolkit Development Cross-REL working group memo #24	2 weeks after meeting					
2.1	.1	.25.b	Toolkit Development Cross-REL working group agenda #25	2 weeks before meeting					
2.1	.2	.25.b	Toolkit Development Cross-REL working group memo #25	2 weeks after meeting					
2.1	.1	.26.b	Toolkit Development Cross-REL working group agenda #26	2 weeks before meeting					
2.1	.2	.26.b	Toolkit Development Cross-REL working group memo #26	2 weeks after meeting					
2.1	.1	.27.b	Toolkit Development Cross-REL working group agenda #27	2 weeks before meeting					
2.1	.2	.27.b	Toolkit Development Cross-REL working group memo #27	2 weeks after meeting					
2.1	.1	.28.b	Toolkit Development Cross-REL working group agenda #28	2 weeks before meeting					
2.1	.2	.28.b	Toolkit Development Cross-REL working group memo #28	2 weeks after meeting					
2.1	.1	.29.b	Toolkit Development Cross-REL working group agenda #29	2 weeks before meeting					
2.1	.2	.29.b	Toolkit Development Cross-REL working group memo #29	2 weeks after meeting					
2.1	.1	.30.b	Toolkit Development Cross-REL working group agenda #30	2 weeks before meeting					
2.1	.2	.30.b	Toolkit Development Cross-REL working group memo #30	2 weeks after meeting					
2.1	.3	.1.a	Proposal for 18 Month Literacy Cross-REL Public Facing Document	1/31/23	1/23/2023	2/7/2023	2/14/2023		1
2.1	.3	.2.a	18 Month Literacy Cross-REL Public Facing Product	6/30/23	5/22/2023	6/12/2023	7/30/2023		1

2.3			Coordinate and collaborate with regional Comprehensive Centers, other Department technical assistance providers, and IES investments						
2.3	.1	.1	Signed letter(s) of intent with each regional CC in REL Region	4/25/22	4/20/2022	4/26/2022	5/9/2022		1
2.3	.2	.1	Year 1 Annual memo of needs sensing between REL and CCs	3/1/23	2/28/2023	3/8/2023	3/15/2023		1
2.3	.2	.2	Year 2 Annual memo of needs sensing between REL and CCs	4/1/24	3/28/2024				1
2.3	.3	.1	Year 1 Joint needs sensing summary meeting minutes	12/5/22	12/5/2022	12/20/2022	12/19/2022		1
2.3	.3	.2	Year 2 Joint needs sensing summary meeting minutes	3/1/23	2/22/2023				1
2.3	.3	.3	Year 3 Joint needs sensing summary meeting minutes	TBD	3/28/2024	5/9/2024			
2.3	.3	.4	Year 4 Joint needs sensing summary meeting minutes	TBD					
TASK 3 - Working in Partnership with Stakeholders									
3.1			Conduct needs-sensing and develop partnerships						
3.1	.1	.1	Partnership Proposal--South Carolina Professional Learning Community: Emergent Literacy Implementation (SCPLC)	4/29/2022	4/15/2022	4/19/2022	5/31/2022		1
3.1	.1	.2	Partnership Proposal--Mississippi Adolescent Literacy (MSAL)	4/29/2022	4/28/2022	5/11/2022	5/31/2022		1
3.1	.1	.3	Partnership Proposal--Alabama Research Partnership on Improving English Learner Outcomes (ALEO)	4/29/2022	4/29/2022	5/11/2022	5/31/2022		1
3.1	.1	.4	Partnership Proposal--Florida K-3 Literacy (FLK3)	11/30/2022	9/20/2022		12/30/2022		1
3.1	.1	.5	Partnership Proposal--Florida Virtual School Partnership (FLVS)	6/30/2022	6/23/2022	6/29/2022	7/29/2022		1
3.1	.1	.6	Partnership Proposal--School Climate and Literacy (SCAL4GA)	6/30/2022	6/30/2022	7/22/2022	7/30/2022		1
3.1	.1	.7	Partnership Proposal--North Carolina Competency-Based Education Partnership (NCCBE)	4/29/2022	4/29/2022	5/10/2022	5/31/2022		1

3.1	.1	.8	Partnership Proposal-- Diversifying the Educator Pipeline at Historically Black Colleges and Universities (HBCUs)	2/28/2023	2/28/2023	3/9/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.	1	
3.1	.1	.9	New Partnership Proposal	As needed; 2 weeks before meeting						
3.1	.1	.10	New Partnership Proposal	As needed; 2 weeks before meeting						
3.2	.		Maintain partnerships under subtask 3.1							
3.2	.1	.1	Partnership meeting materials and agendas for Year 1 Quarter 1	4/28/2022	NA		5/12/2022			
3.2	.2	.1	Partnership meeting summary memos for Year 1 Quarter 1	4/28/2022	NA		5/12/2022			
3.2	.1	.2	Partnership meeting materials and agendas for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022		1	
3.2	.2	.2	Partnership meeting summary memos for Year 1 Quarter 2	7/28/2022	7/14/2022	7/14/2022	8/11/2022		1	
3.2	.1	.3	Partnership meeting materials and agendas for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022		1	
3.2	.2	.3	Partnership meeting summary memos for Year 1 Quarter 3	10/27/2022	10/19/2022	10/24/2022	11/10/2022		1	
3.2	.1	.4	Partnership meeting materials and agendas for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023		1	
3.2	.2	.4	Partnership meeting summary memos for Year 1 Quarter 4	1/26/2023	1/19/2023	1/24/2023	2/9/2023		1	
3.2	.1	.5	Partnership meeting materials and agendas for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023		1	
3.2	.2	.5	Partnership meeting summary memos for Year 2 Quarter 1	4/27/2023	4/21/2023	4/30/2023	5/11/2023		1	
3.2	.1	.6	Partnership meeting materials and agendas for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023		1	

3.2	.2	.6	Partnership meeting summary memos for Year 2 Quarter 2	7/27/2023	7/12/2023	7/12/2023	8/10/2023		1
3.2	.1	.7	Partnership meeting materials and agendas for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023		1
3.2	.2	.7	Partnership meeting summary memos for Year 2 Quarter 3	10/27/2023	10/21/2023	10/27/2023	11/10/2023		1
3.2	.1	.8	Partnership meeting materials and agendas for Year 2 Quarter 4	1/31/2024	1/18/2024	1/23/2024	2/14/2024		1
3.2	.2	.8	Partnership meeting summary memos for Year 2 Quarter 4	1/31/2024	1/18/2024	1/23/2024	2/14/2024		1
3.2	.1	.9	Partnership meeting materials and agendas for Year 3 Quarter 1	4/28/2024	4/24/2024	5/1/2024	5/12/2024		1
3.2	.2	.9	Partnership meeting summary memos for Year 3 Quarter 1	4/28/2024	4/24/2024	5/1/2024	5/12/2024		1
3.2	.1	.10	Partnership meeting materials and agendas for Year 3 Quarter 2	7/31/2024	7/31/2024	8/9/2024	8/14/2024		1
3.2	.2	.10	Partnership meeting summary memos for Year 3 Quarter 2	7/31/2024	7/31/2024	8/9/2024	8/14/2024		1
3.2	.1	.11	Partnership meeting materials and agendas for Year 3 Quarter 3	10/31/2024				11/14/2024	
3.2	.2	.11	Partnership meeting summary memos for Year 3 Quarter 3	10/31/2024				11/14/2024	
3.2	.1	.11	Partnership meeting materials and agendas for Year 3 Quarter 4	1/31/2025				2/14/2025	
3.2	.2	.11	Partnership meeting summary memos for Year 3 Quarter 4	1/31/2025				2/14/2025	
3.2	.3	.1	Summary of Stakeholder Feedback Survey results for partnerships Year 1	11/30/2022	11/30/2022	12/9/2022	12/14/2022		
3.2	.3	.2	Summary of Stakeholder Feedback Survey results for partnerships Year 2	11/30/2023	11/30/2023	12/1/2023	12/14/2023		
3.2	.3	.3	Summary of Stakeholder Feedback Survey results for partnerships Year 3	11/29/2024				12/13/2024	
TASK 4 - Training, Coaching, and Technical Support (TCTS)									
4.1			TCTS Projects						

4.1	.1	.1	* .*	South Carolina Emergent Literacy Professional Learning Community Sarah Hughes	Draft Date Due	Submitted	Approved	Final Date Due		
4.1	.1	.2	.1	Proposal for Project	4/29/2022	4/15/2022	4/21/2022	5/31/2022		1
4.1	.1	.3	.1	Materials and Agenda for TCTS Session 1	6/30/2022	6/28/2022	7/12/2022	7/21/2022		1
4.1	.1	.3	.2	Materials and Agenda for TCTS Session 2	9/30/2022	9/20/2022	9/30/2022	10/21/2022		1
4.1	.1	.5	.1	Interim Project Summary	12/16/2022	12/5/2022	12/15/2022			1
4.1	.1	.3	.3	Materials and Agenda for TCTS Session 3	12/30/2022	12/12/2022	12/20/2022	1/20/2023		1
4.1	.1	.3	.4	Materials and Agenda for TCTS Session 4	3/31/2023	3/13/2023	3/22/2023	4/21/2023		1
4.1	.1	.4	.1	Stakeholder Feedback Survey	10 working days after final event	4/11/2023	4/17/2023	25 working days after final event		1
4.1	.1	.5	.2	Coaching Summary and Stakeholder Feedback Survey Summary	6/30/2023	4/17/2023	4/24/2023	7/21/2023		1
4.1	.1	.2	.2	Proposal for Extension Project	8/30/2023	8/14/2023	8/18/2023	9/20/2023		1
4.1	.1	.3	.5	Materials and Agenda for Extension Session 5	10/31/2023	10/26/2023	10/30/2023	11/21/2023		1
4.1	.1	.3	.6	Materials and Agenda for Extension Session 6	2/28/2024	2/21/2024	2/27/2024	3/20/2024		1
4.1	.1	.3	.7	Materials and Agenda for Extension Session 7	5/31/2024	5/13/2024	5/20/2024	6/21/2024		1
4.1	.1	.3	.8	Materials and Agenda for Extension Session 8	8/31/2024	8/26/2024	8/28/2024	9/21/2024		1
4.1	.1	.3	.9	Materials and Agenda for Extension Session 9	3/31/2025			4/21/2025	Revised Due Date approved per Janelle's email on 09/12/2024. Original due date was 11/30/2024.	
4.1	.1	.4	.2	Extension Project Stakeholder Feedback Survey	10 working days after final event			25 working days after final event	Revised Due Date approved per Janelle's email on 09/12/2024	
4.1	.1	.5	.3	Extension Coaching Summary and Stakeholder Feedback Survey Summary	4/30/2025			5/14/2025	Revised Due Date approved per Janelle's email on 09/12/2024. Original due date was 02/28/2025.	

4.1	.1	.6	.1	Support Plan for PLC Facilitator	7/31/2025			8/14/2025		
4.1	.2	* .*		Adolescent Literacy Strategies Grades 4-12 Content Area Teachers Llee						
4.1	.2	.2	.1	Proposal	4/29/2022	4/28/2022	5/3/2022	5/29/2022		1
4.1	.2	.3	.1	Materials and Agenda for TCTS Session 1	8/30/2022	6/27/2022	6/30/2022	9/20/2022		1
4.1	.2	.3	.2	Materials and Agenda for TCTS Session 2	9/30/2022	7/19/2022	7/20/2022	10/21/2022		1
4.1	.2	.3	.3	Materials and Agenda for TCTS Session 3	10/31/2022	8/22/2022	9/7/2022	11/21/2022		1
4.1	.2	.3	.4	Materials and Agenda for TCTS Session 4	11/30/2022	9/2/2022	9/9/2022	12/21/2022		1
4.1	.2	.3	.5	Materials and Agenda for TCTS Session 5	12/31/2022	12/9/2022	12/15/2022	1/21/2023		1
4.1	.2	.3	.6	Materials and Agenda for TCTS Session 6	1/31/2023	1/11/2023	1/23/2023	2/21/2023		1
4.1	.2	3	.9	Implementation/Facilitators Guide	6/30/2023	6/26/2023	7/7/2023	7/21/2023		1
4.1	.2	3	.10	Materials and Agenda for Expansion TCTS Session 1	7/15/2024	7/15/2024		8/5/2024		1
4.1	.2	3	.11	Materials and Agenda for Expansion TCTS Session 2	9/13/2024	9/12/2024	9/18/2024			1
4.1	.2	3	.12	Materials and Agenda for Expansion TCTS Session 3	9/13/2024	9/12/2024	9/18/2024			1
4.1	.2	3	.13	Materials and Agenda for Expansion TCTS Session 4	11/30/2024					
4.1	.2	3	.14	Materials and Agenda for Expansion TCTS Session 5	1/31/2025					
4.1	.2	3	.15	Materials and Agenda for Expansion TCTS Session 6	4/30/2025					
4.1	.2	.4	.1	Stakeholder Feedback Survey	10 working days after final event	3/15/2023	3/28/2023	25 working days after final event		1
4.1	.2	.4	.2	Stakeholder Feedback Survey for Expansion Project	10 working days after final event	5/30/2025		25 working days after final event		1
4.1	.3	* .*		Evidence-Based Intervention Practices Grades 4-8 Literacy Intervention Teachers MJ Taylor						
4.1	.3	.2	.1	Proposal	7/29/2022	7/15/2022	7/20/2022	8/28/2022		1
4.1	.3	.3	.1	Materials and Agenda for Sessions 1-6 on Multisyllabic words and Fluency both grade bands	10/30/2022	10/31/2022	12/19/2022	11/20/2022		0
4.1	.3	.3	.2	Materials and Agenda for Sessions 7-10 on Vocabulary, both grade bands	6/30/2023	6/22/2023	7/13/2023	7/21/2023		1

4.1	.3	.3	.3	Materials and Agenda for Sessions 7A, 7B, 8A, & 8B on Vocabulary, both grade bands	11/30/2023	10/13/2023	10/23/2023	12/21/2023		1
4.1	.3	.3	.4	Materials and Agenda for Vocabulary Leadership Walkthrough Session 3	11/30/2023	11/17/2023	11/27/2023	12/21/2023		1
4.1	.3	3	.5	Five Implementation/Facilitators Guides	12/18/2024	10/3/2024	10/10/2024	1/8/2025		1
4.1	.3	.4	.1	Interim Stakeholder Feedback Survey	7/31/2024	12/13/2023	12/18/2023	8/21/2024		1
4.1	.3	.5	.1	Interim Summary	7/31/2024	12/13/2023	12/18/2023	8/21/2024		1
4.1	.3	.4	.2	Final Stakeholder Feedback Survey	10 working days after final event	5/14/2024	5/23/2024	25 working days after final event		
4.1	.3	.5	.2	Final Summary	12/18/2024					
4.1	4	* .*		AL ELO--Supporting Implementation of Practice Guide						
4.1	.4	.1	.1	Concept Paper for ALEL-- Supporting Implementation of Practice Guide	4/29/2022	4/29/2022	5/11/2022	5/31/2022		1
4.1	.4	.2	.1	Proposal	6/30/2022	6/13/2022	7/11/2022	7/30/2022		1
4.1	.4	.3	.1	Materials and Agenda for TCTS Session 1	7/12/2022	7/11/2022	7/12/2022	TBD		1
4.1	.4	.3	.2	Materials and Agenda for TCTS Session 2	8/12/2022	8/11/2022	8/23/2022			1
4.1	.4	.3	.3	Materials and Agenda for TCTS Session 3	9/13/2022	9/12/2022	9/15/2022			1
4.1	.4	.3	.4	Materials and Agenda for TCTS Session 4	10/7/2022	10/6/2022	10/14/2022			1
4.1	.4	.3	.5	Materials and Agenda for TCTS Session 5	11/29/2022	11/28/2022	12/9/2022	12/13/2022		1
4.1	.4	.3	.6	Materials and Agenda for TCTS Session 6	1/17/2023	1/13/2023	1/23/2023	1/31/2023		1
4.1	.4	.3	.7	Materials and Agenda for TCTS Session 7	2/14/2023	2/13/2023	2/21/2023	2/28/2023		1
4.1	.4	.3	.8	Materials and Agenda for TCTS Session 8	3/14/2023	3/14/2023	3/28/2023	3/28/2023		1
4.1	.4	.3	.9	Materials and Agenda for Coaching Session 9	4/11/2023	4/11/2023	4/17/2023	4/25/2023		1
4.1	.4	.3	.10	Materials and Agenda for Coaching Session 10	TBD	10/10/2023	10/19/2023	TBD	Original due date was 08/30/2023. Request to change due date to TBD approved by Janelle on 09/08/2023.	1

4.1	.4	.3	.11	Materials and Agenda for Coaching Session 11	1/31/2024	12/15/2023	1/5/2024	2/14/2024	Original due date was 11/16/2023. Janelle approved a revision to 01/31/2024 via email on 11/14/2023.	1
4.1	.4	.3	.12	Materials and Agenda for Coaching Session 12	2/15/2024	2/9/2024	2/20/2024	2/29/2024		1
4.1	.4	.3	.13	Materials and Agenda for Coaching Session 13	4/19/2024	4/9/2024	4/16/2024	5/3/2024		1
4.1	.4	.3	.14	Submit and refine Session 1 coaching materials and agenda	8/12/2024	8/9/2024	8/16/2024	8/26/2024		1
4.1	.4	.3	.15	Submit and refine Session 2 coaching materials and agenda	9/12/2024	9/11/2024	9/18/2024	9/26/2024		1
4.1	.4	.3	.16	Submit and refine Session 3 coaching materials and agenda	10/14/2024	10/08/20204			10/28/2024	
4.1	.4	.3	.17	Submit and refine Session 4 coaching materials and agenda	11/6/2024				11/20/2024	
4.1	.4	.3	.18	Submit and refine Session 5 coaching materials and agenda	1/9/2025				1/23/2025	
4.1	.4	.3	.19	Submit and refine Session 6 coaching materials and agenda	2/10/2025				2/24/2025	
4.1	.4	.3	.20	Submit and refine Session 7 coaching materials and agenda	3/5/2025				3/19/2025	
4.1	.4	.3	.21	Submit and refine Session 8 coaching materials and agenda	4/10/2025				4/24/2025	
4.1	.4	.5	.1	Interim Project Summary Phase 1	4/28/2023	5/3/2023	5/5/2023	5/12/2023		0
4.1	.4	.4	.1	Stakeholder Feedback Survey Phase 1	6/21/2024	4/23/2024	4/26/2024	25 working days after final event		1
4.1	.4	.4	.2	Mid-year SFS Phase 2	1/31/2025					
4.1	.4	.4	.3	Final SFS Phase 2	5/9/2025					
4.1	.4	.5	.2	Final Summary Phase 1	5/31/2024	5/31/2023	6/2/2023	6/14/2024		1
4.1	.4	.5	.3	Interim Project Summary Phase 2	2/14/2025					
4.1	.4	.5	.4	Final Project Summary Phase 2	5/16/2025					
4.1	5	*.*		FLK5 Implementation of K-5						

				Literacy Academies						
4.1	.5	.1	.1	Concept Paper for FLK5 Implementation of K-5 Literacy Academies	9/30/2022	9/20/2022	10/2/2022	10/30/2022		1
4.1	.5	.2	.1	Proposal	11/30/2022	11/21/2022	12/6/2022	12/30/2022		1
4.1	.5	.3	.1	Materials and Agenda for TCTS Summer Reading Camp Session 1	1/31/2023	1/10/2023	1/23/2023	TBD		1
4.1	.5	.4	.1	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023	25 working days after final event		1
4.1	.5	.5	.1	Post-event Summary for TCTS Summer Reading Camp Session 1	10 working days after final event	2/16/2023	2/28/2023			1
4.1	.5	.3	.2	Materials and Agenda for TCTS Summer Reading Camp Session 2	3/31/2023	2/14/2023	2/28/2023			1
4.1	.5	.4	.2	Stakeholder Feedback Survey for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023			1
4.1	.5	.5	.2	Post-event Summary for TCTS Summer Reading Camp Session 2	10 working days after final event	3/15/2023	3/28/2023			1
4.1	.5	.3	.3	Materials and Agenda for TCTS Content Area Session 1	4/30/2023	3/30/2023	4/10/2023			1
4.1	.5	.3	.4	Materials and Agenda for TCTS Content Area Session 2	5/31/2023	4/19/2023	4/30/2023			1
4.1	.5	.3	.5	Materials and Agenda for TCTS Content Area Session 3	6/30/2023	5/8/2023	5/16/2023			1
4.1	.5	.3	.6	Materials and Agenda for TCTS Content Area Session 4	7/31/2023	5/9/2023	5/17/2023			1
4.1	.5	.3	.7	Materials and Agenda for TCTS Content Area Session 5	8/31/2023	5/12/2023	5/17/2023			1
4.1	.5	.4	.3	Stakeholder Feedback Survey for TCTS Content Area Sessions	10 working days after final event					
4.1	.5	.5	.3	Post-event Summary for TCTS Content Area Sessions	10 working days after final event					
4.1	.5	.3	.8	Materials and Agenda for TCTS Differentiated Instruction Session 1	9/30/2023	7/6/2023	7/10/2023			1
4.1	.5	.3	.9	Materials and Agenda for TCTS Differentiated Instruction Session 2	10/31/2023	8/10/2023	8/18/2023			1
4.1	.5	.3	.10	Materials and Agenda for TCTS Differentiated Instruction Session 3	11/30/2023	9/22/2023	9/26/2023			1
4.1	.5	.4	.4	Stakeholder Feedback Survey for TCTS Content Area	10 working days after	11/21/2023	11/27/2023			1

					Sessions	final event						
4.1	.5	.5	.4		Post-event Summary for TCTS Content Area Sessions	10 working days after final event	11/21/2023	11/27/2023				1
4.1	.5	.3	.11		Materials and Agenda for Seminole expansion Session 1	11/26/2024						
4.1	.5	.3	.12		Materials and Agenda for Seminole expansion Session 2	12/20/2024						
4.1	.5	.3	.13		Materials and Agenda for Seminole expansion Session 3	1/31/2024						
4.1	.5	.3	.14		Materials and Agenda for Seminole expansion Session 4	2/28/2024						
4.1	.5	.3	.15		Materials and Agenda for Seminole expansion Session 5	3/31/2025						
4.1	.5	.4	.4		Seminole expansion Stakeholder Feedback Survey	10 working days after final event						
4.1	.5	.5	.4		Post-event Summary for Seminole expansion Sessions	10 working days after final event						
4.1	.5	.3	.16		Materials and Agenda for PAEC Differentiated Instruction Session 1	1/31/2024						
4.1	.5	.4	.5		PAEC Stakeholder Feedback Survey	10 working days after final event						
4.1	.5	.5	.5		Post-event Summary for PAEC Session	10 working days after final event						
4.1	6	*	.1		FLVS Identification of Needs							
4.1	.6	.1	.1		Concept Paper for FLVS Identification of Needs	6/30/2022	6/23/2022	6/29/2022	7/29/2022			1
4.1	.6	.2	.1		Proposal	8/5/2022	7/22/2022	7/26/2022	9/2/2022			1
4.1	.6	.3	.1		Materials and Agenda for TCTS Sessions 1A and 1B	10/13/2022	10/12/2022	10/19/2022	10/27/2022			1
4.1	.6	.3	.2		Materials and Agenda for TCTS Session 2	12/30/2022	10/28/2022	11/9/2022	1/13/2023			1
4.1	.6	.3	.3		Materials and Agenda for TCTS Session 3	1/31/2022	1/26/2023	2/7/2023	2/14/2022			0
4.1	.6	.5	.1		Interim Project Summary	12/15/2022	12/12/2022	12/20/2022	12/29/2022			1
4.1	.6	.4	.1		Stakeholder Feedback Survey	10 working days after final event	3/14/2023	3/28/2023	25 working days after final event			1
4.1	.6	.5	.2		Final Project Summary	3/14/2023	3/14/2023	3/28/2023	3/28/2023			1
4.1	7	*	*		SCAL4GA Exploring Relationship between School Climate and School Literacy							

4.1	.7	.1	.1	Concept Paper for SCAL4GA Exploring Relationship between School Climate and School Literacy	6/30/2022	6/30/2022	7/22/2022	7/30/2022		1
4.1	.7	.2	.1	Proposal	8/31/2022	8/29/2022	8/31/2022	10/15/2022		1
4.1	.7	.3	.1	Materials and Agenda for TCTS Session #1	10/31/2022	10/18/2022	10/24/2022	11/21/2022		1
4.1	.7	.3	.2	Materials and Agenda for TCTS Session #2	12/30/2022	11/28/2022	12/4/2022	1/20/2023		1
4.1	.7	.3	.3	Materials and Agenda for TCTS Session #3	2/28/2023	2/2/2023	2/21/2023	3/21/2023	Original due date was 01/31/2023. Date change approved via email by Janelle on 12/21/2022.	1
4.1	.7	.3	.4	Materials and Agenda for TCTS Session #4	3/31/2023	3/10/2023	4/4/2023	4/21/2023		1
4.1	.7	.3	.5	Materials and Agenda for TCTS Session #5	4/28/2023	4/17/2023	4/24/2023	5/19/2023		1
4.1	.7	.4	.1	Stakeholder Feedback Survey	7/31/2023	7/27/2023	7/28/2023	25 working days after final event		1
4.1	.7	.5	.1	Final Project Summary	7/31/2023	7/27/2023	7/28/2023	8/14/2023		1
4.1	8	* .*		NCCBE Implementation and Lessons Learned in CBE						
4.1	.8	.1	.1	Concept Paper for NCCBE Implementation and Lessons Learned in CBE	4/29/2022	4/29/2022	5/10/2022	5/29/2022		1
4.1	.8	.2	.1	Proposal	6/12/2022	6/1/2022	6/10/2022	7/12/2022		1
4.1	.8	.3	.1	Materials and Agenda for NEAAAT TCTS Session #1	9/9/2022	9/7/2022	9/12/2022	9/23/2022		1
4.1	.8	.3	.2	Materials and Agenda for TCTS NEHS Session #1	9/9/2022	9/6/2022	9/12/2022	9/23/2022		1
4.1	.8	.3	.3	Materials and Agenda for NEAAAT TCTS Session #2	10/20/2022	10/20/2022	10/26/2022	11/3/2022		1
4.1	.8	.3	.4	Materials and Agenda for NEAAAT TCTS Session #3	1/6/2023	1/6/2023	1/17/2023	1/20/2023		1
4.1	.8	.3	.5	Materials and Agenda for NEAAAT TCTS Session #4	2/10/2023	2/10/2023	2/21/2023	2/24/2023	Original due date was 02/03/2023. Date change approved via email by Janelle on 02/03/2023.	1
4.1	.8	.3	.6	Materials and Agenda for NEAAAT TCTS Session #5	3/17/2023	3/16/2023	3/28/2023	3/31/2023	Original due date was 03/03/2023.	1

								Date change approved via email by Janelle on 03/01/2023.	
4.1	.8	.3	.7	Materials and Agenda for NEAAAT TCTS Session #6	9/15/2023	9/15/2023	9/21/2023	9/29/2023	Original due date was 04/07/2023. Date change approved via email by Janelle on 03/30/2023. Date change from 05/12/2023 to 05/26/2023 approved by Janelle on 05/15/2023. Additional date change to 08/04/223 approved by Janelle on 05/24/2023. Further date change to 09/15/2023 approved by Janelle on 07/28/2023.
4.1	.8	.3	.8	Materials and Agenda for NEAAAT TCTS Session #7	9/29/2023	9/25/2023	9/26/2023	10/13/2023	Original due date was 08/04/2023. Date change approved via email by Janelle on 05/24/2023. Additional date change to 09/29/2023 approved by Janelle on 07/29/2023.
4.1	.8	.3	.9	Materials and Agenda for NEAAAT TCTS Session #8	10/13/2023	9/25/2023	9/28/2023	10/27/2023	Original due date was 09/08/2023. Date change approved via email by

									Janelle on 05/24/2023.	
4.1	.8	.3	.10	Materials and Agenda for NEAAAT TCTS Session #9	12/20/2023	12/14/2023	12/20/2023	1/3/2024		1
4.1	.8	.3	.15	Materials and Agenda for NEAAAT TCTS Session #10	1/4/2024	1/4/2024	1/10/2024	1/18/2024		1
4.1	.8	.3	.16	Materials and Agenda for NEAAAT TCTS Session #11	2/16/2024	1/19/2024	1/31/2024	3/1/2024		1
4.1	.8	.3	.17	Materials and Agenda for NEAAAT TCTS Session #12	9/17/2024	9/16/2024	9/23/2024	10/1/2024		1
4.1	.8	.3	.18	Materials and Agenda for NEAAAT TCTS Session #13	10/15/2024	10/15/2024			10/29/2024	
4.1	.8	.3	.19	Materials and Agenda for NEAAAT TCTS Session #14	11/12/2024				11/26/2024	
4.1	.8	.3	.20	Materials and Agenda for NEAAAT TCTS Session #15	2/17/2024				3/2/2024	
4.1	.8	.3	.21	Materials and Agenda for NEAAAT TCTS Session #16	3/18/2024				4/1/2024	
4.1	.8	.3	.22	Materials and Agenda for NEAAAT TCTS Session #17	4/15/2024				4/29/2024	
4.1	.8	.3	.23	Materials and Agenda for TCTS NEHS Session #2	10/27/2022	10/20/2022	10/26/2022	11/10/2022		1
4.1	.8	.3	.11	Materials and Agenda for TCTS NEHS Session #3	2/1/2023	1/11/2023	1/23/2023	2/15/2023	Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.	1
4.1	.8	.3	.12	Materials and Agenda for TCTS NEHS Session #4	3/1/2023	2/21/2023	3/2/2023	3/15/2023	Original due date was 01/6/2023. Date change approved via email by Janelle on 1/4/2023.	1
4.1	.8	.3	.13	Materials and Agenda for TCTS NEHS Session #5	TBD			TBD	Original due date was 08/04/2023. Date change approved via email by Janelle on 1/4/2023. On 09/06/2023, changed date from revised date of 09/01/2023 to TBD per John's	

4.1	.8	.3	.14	Materials and Agenda for TCTS NEHS Session #6	10/2/2023			10/16/2023	email by Janelle on 1/4/2023. Project on hold per Kevin on 09/28/2023	Original due date was 08/04/2023. Date change approved via	
4.1	.8	.4	.1	Stakeholder Feedback Survey NEAAAT	10 working days after final event			25 working days after final event			
4.1	.8	.4	.2	Stakeholder Feedback Survey NEHS	10 working days after final event			25 working days after final event			
4.1	.8	.5	.1	Interim Project Summary	7/31/2023	7/21/2023	7/27/2023	8/14/2023		1	
4.1	.8	.5	.2	Interim Project Summary	7/31/2024	3/22/2024	4/7/2024	8/14/2024		1	
4.1	.8	.5	.3	Final Project Summary	7/31/2025			8/14/2025			
4.1	9	*	*	HBCUs Examination of Teacher Preparation Outcomes							
4.1	.9	.1	.1	Concept Paper for HBCU Examination of Teacher Preparation Outcomes	2/28/2023	2/28/2023	3/8/2023	4/14/2023	Revised Due Date approved per Janelle's email on 11/23/2022. Original due date was 11/30/2022.	1	
4.1	.9	.2	.1	Proposal	5/31/2023	5/30/2023	6/2/2023			1	
4.1	.9	.3	.1	Materials and Agenda for TCTS Sessions #1	8/15/2023	8/10/2023	8/15/2023	8/29/2023		1	
4.1	.9	.3	.2	Materials and Agenda for TCTS Sessions #2	8/15/2023	8/10/2023	8/15/2023	8/29/2023		1	
4.1	.9	.3	.3	Materials and Agenda for TCTS Sessions #3	10/16/2023	9/25/2023	9/26/2023	10/30/2023		1	
4.1	.9	.3	.4	Materials and Agenda for TCTS Sessions #4	11/15/2023	11/9/2023	11/16/2023	11/29/2023		1	
4.1	.9	.3	.5	Materials and Agenda for TCTS Sessions #5	2/15/2024	2/12/2024	2/20/2024	2/29/2024		1	
4.1	.9	.3	.6	Materials and Agenda for TCTS Sessions #6	2/15/2024	2/13/2024	2/20/2024	2/29/2024		1	
4.1	.9	.3	.7	Materials and Agenda for TCTS Sessions #7	8/15/2024	8/14/2024	8/23/2024	8/29/2024	Date Change approved by Janelle 5/3/24	1	
4.1	.9	.3	.8	Materials and Agenda for TCTS Sessions #8	1/30/2025			2/13/2025	Date change to 01/30/2025		

							due to partners request to modify content	
4.1	.9	.3	.9	Materials and Agenda for TCTS Sessions #9	3/31/2025		4/14/2025	Date change to 03/31/2025 due to partners request to modify content
4.1	.9	.3	.10	Materials and Agenda for TCTS Sessions #10	4/30/2025		5/14/2025	Date change to 04/30/2025 due to partners request to modify content
4.1	.9	.4	.1	Stakeholder Feedback Survey	10 working days after final event		25 working days after final event	
4.1	.9	.5	.1	Interim Project Summary	5/31/2024	5/31/2024	6/5/2024	
4.1	.9	.5	.2	Final Project Summary	5/31/2025			requesting change to incorporate activities of final coaching session
4.1	10	* .*	*	Indian River School District Evaluation Planning				
4.1	.10	.1	.1	Concept Paper	TBD	11/4/2022		TBD
4.1	.10	.2	.1	Proposal	TBD	12/5/2022	12/15/2022	TBD
4.1	.10	.3	.1	Materials and Agenda for TCTS Sessions	TBD	1/17/2023	1/24/2023	TBD
4.1	.10	.4	.1	Stakeholder Feedback Survey	10 working days after final event	3/22/2023	3/28/2023	25 working days after final event
4.1	11	* .*	*	FLVS	TBD			
4.1	.11	.1	.1	Concept Paper for FLVS	TBD	6/13/2023	6/28/2023	TBD
4.1	.11	.2	.1	Proposal	TBD	8/2/2023	09/06/223	TBD
4.1	.11	.3	.1	Materials and Agenda for TCTS Session #1	TBD	9/25/2023	9/26/2023	TBD
4.1	.11	.3	.2	Materials and Agenda for TCTS Session #2	TBD	12/7/2023	12/14/2023	TBD
4.1	.11	.3	.3	Materials and Agenda for TCTS Session #3	3/29/2024	3/25/2024	4/7/2024	4/12/2024
4.1	.11	.3	.4	Materials and Agenda for TCTS Session #4	6/28/2024	6/13/2024	6/17/2024	7/12/2024
4.1	.11	.3	.5	Materials and Agenda for TCTS Session #5	9/12/2024	9/9/2024	9/16/2024	9/26/2024
								Original due date was 08/30/2024. Date change approved via email by

						Janelle on 07/02/2024.	
4.1 .11.3 .6	Materials and Agenda for TCTS Session #6		10/31/2024		11/14/2024	This topic no longer needed; FLVS is working with a core group of practitioners for developing and revising the infographic organizational supports that this session planned to target.	
4.1 .11.3 .7	Materials and Agenda for TCTS Session #7	1/15/2024		1/29/2024			
4.1 .11.3 .8	Materials and Agenda for TCTS Session #8	1/31/2025		2/14/2025			
4.1 .11.3 .9	Materials and Agenda for TCTS Session #9	4/30/2025		5/14/2025			
4.1 .11.3 .10	Materials and Agenda for TCTS Session #10	6/30/2025		7/14/2025	This topic no longer needed; FLVS is working with a core group of practitioners for developing and revising the infographic organizational supports that this session planned to target.		
4.1 .11.3 .11	Materials and Agenda for TCTS Session #11	8/29/2025		9/12/2025			
4.1 .11.3 .12	Materials and Agenda for TCTS Session #12	10/31/2025		11/14/2025			
4.1 .11.3 .13	Materials and Agenda for TCTS Session #13	12/31/2025		1/14/2026			
4.1 .11.3 .14	Materials and Agenda for TCTS Session #14	1/30/2026		2/13/2026			
4.1 .11.3 .15	Materials and Agenda for TCTS Session #15	4/30/2026		5/14/2026			
4.1 .11.3 .16	Materials and Agenda for TCTS Session #16	6/30/2026		7/14/2026			

4.1	.11.4	.1	Stakeholder Feedback Survey	10 working days after final event	6/30/2026		25 working days after final event		
4.1	.11.5	.1	Interim Project Summary	7/31/2024	7/31/2024	8/9/2024			1
4.1	.11.5	.2	Interim Project Summary	7/31/2025					
4.1	.11.5	.3	Final Project Summary	7/31/2026					
4.1	12.*	.*	SCAL4GA Exploring Relationship between School Climate and School Literacy	TBD					
4.1	.12.1	.1	Concept Paper	TBD	11/20/2023	11/22/2023	TBD		1
4.1	.12.2	.1	Proposal	TBD	1/30/2024	2/15/2024	TBD		
4.1	.12.3	.1	Materials and Agenda for TCTS Session 1	3/22/2024			TBD		1
4.1	.12.3	.2	Materials and Agenda for TCTS Session 2	6/6/2024	6/6/2024	6/17/2024			
4.1	.12.3	.3	Materials and Agenda for TCTS Session 3	8/15/2024	8/12/2024	8/21/2024			
4.1	.12.4	.1	Stakeholder Feedback Survey	10 working days after final event	9/26/2024		25 working days after final event		
4.1	.12.5	.2	Final Project Summary	9/30/2024	9/26/2024				
4.1	13.*	.*	TBD - Year 3 or later	TBD					
4.1	.13.1	.1	Concept Paper	TBD			TBD		
4.1	.13.2	.1	Proposal	TBD			TBD		
4.1	.13.3	.1	Materials and Agenda for TCTS Sessions	TBD			TBD		
4.1	.13.4	.1	Stakeholder Feedback Survey	10 working days after final event			25 working days after final event		
4.1	.13.5	.1	Interim Project Summary	TBD					
4.1	.13.5	.2	Final Project Summary	TBD					
4.1	14.*	.*	TBD - Starting Year 3	TBD					
4.1	.14.1	.1	Concept Paper	TBD			TBD		
4.1	.14.2	.1	Proposal	TBD			TBD		
4.1	.14.3	.1	Materials and Agenda for TCTS Sessions	TBD			TBD		
4.1	.14.4	.1	Summary of Stakeholder Feedback Survey results session 1	10 working days after final event			25 working days after final event		
4.1	.14.5	.1	Interim Project Summary	TBD					
4.1	.14.5	.2	Final Project Summary	TBD					
4.2			Ask an Expert						
4.2	.1	.1	Ask an Expert Proposal- FCS Assistance	TBD	3/16/22	3/18/22	TBD		1
4.2	.2	.1	Ask an Expert responses memo for Meeting #1	5/5/22	5/5/22	5/13/2022			1

4.2	.3	.1		Ask an Expert responses memo for Meeting #2	5/19/22	5/18/22	5/19/2022			1
4.2	.1	.2		Ask an Expert Proposal	TBD	7/13/22	7/13/22			1
4.2	.2	.2		Ask an Expert responses memo	5 working days after each meeting with the requestor	9/15/2022	9/16/2022			1
4.2	.1	.3		Ask an Expert Proposal	TBD	12/15/22	1/4/23		Concept paper and proposal submitted and approved. Janelle said proposal was not necessary.	1
4.2	.2	.3		Ask an Expert responses memo	5 working days after each meeting with the requestor	3/23/2023	4/4/2023			1
4.2	.1	.4		FLVS Lit Review	5/13/2024	5/13/24	5/20/24			
4.2	.1	.4	.a	FLVS Lit Review Materials	6/14/2024	6/24/24	7/5/24			
4.2	.2	.4		Ask an Expert responses memo	7/26/2024	7/25/2024	8/6/2024			1
4.2	.1	.5		Ask an Expert Proposal	TBD					
4.2	.2	.5		Ask an Expert responses memo	5 working days after each meeting with the requestor					
4.2	.1	.6		Ask an Expert Proposal	TBD					
4.2	.2	.6		Ask an Expert responses memo	5 working days after each meeting with the requestor					
TASK 5 - Applied Research and Peer Reviewed Research-based Development Projects										
5.1				Conduct original, empirical research and develop products						
5.1	.1	.1	*	Evaluating the Implementation of the Emergent Literacy PLC Sarah Herrera						
5.1	.1	.2		Proposal	4/29/2022	4/28/2022	7/13/2022	9/30/2022		1

5.1	.1	.1	.3	Notice of IRB approval or exemption	9/30/2022	9/30/2022	10/12/2022	10/21/2022		1
5.1	.1	.1	.4	Data Management Plan	4/29/2022	4/28/2022	7/13/2022	9/30/2022		1
5.1	.1	.1	.5	OMB clearance package (if applicable to the study)	9/30/2022	9/30/2022		2/28/2023		1
5.1	.1	.1	.6	Data sharing agreement	10/14/2022	10/13/2022		11/4/2022		1
5.1	.1	.1	.7	Research Report	6/30/2025			2/28/2026		1
5.1	.2	.1	*	AL ELO HQIA+						
5.1	.2	.1		Concept Paper	10/31/2022	10/27/2022		11/14/2022		1
5.1	.2	.2		Proposal	4/30/2023	3/31/2023	7/14/2023	5/21/2023		1
5.1	.2	.2	.3	Notice of IRB approval or exemption		2/20/2024	2/20/2024			
5.1	.2	.2	.4	Data Management Plan (if applicable to the study)	7/10/2023	7/10/2023	7/14/2023		Original due date 06/30/2023. Delayed until TBD as proposal has not been reviewed by RPR. 05/30/2023	
5.1	.2	.2	.6	Data sharing agreement or memorandum of understanding (optional)	11/17/2023			12/1/2023	Original due date was 08/31/2023. Date change approved via email by Janelle on 08/21/2023. Date then changed from 10/31/2023 to 11/17/2023 via email with Janelle on 11/09/2023. On August 14, 2024, ALSDE confirmed that they will provide the data without a DSA or MOU.	
5.1	.2	.2	.7	Research Report	6/30/2025			TBD		
5.1	.2	.2	.8	Preliminary Results PowerPoint	3/31/2025			TBD	Deliverable addition approved by Janelle on 9/26/24	

5.1	.3	*	Toolkit Evaluation: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades Katie Dahlke						
5.1	.3	.2	Proposal Toolkit Evaluation	9/29/2023	9/29/2023	2/6/2024	3/31/2023		1
5.1	.3	.3	Notice of IRB approval or exemption	10/18/2024			9/30/2024	NEW due date; 10/18/24. Original due date was 09/30/2024. Date change approved via email by Janelle on 09/25/2024.	
5.1	.3	.4	Data Management Plan	9/29/2023	9/29/2023		3/31/2023		1
5.1	.3	.5	OMB clearance package	3/30/2024	3/22/2024	4/23/2024	9/30/2024		1
5.1	.3	.6	Data sharing agreement or memorandum of understanding	5/31/2025			6/30/2024		
5.1	.3	.7	Research Report	7/31/2026			12/30/2026		
5.1	.4	*	Competency Based Education as a Promising Practice for Improving Student Outcomes at NEAAAT						
5.1	.4	.1	Concept Paper		3/19/2024	3/29/2024			
5.1	.4	.2	Proposal	6/30/2024	6/28/2024	8/8/2024			
5.1	.4	.3	Notice of IRB approval or exemption	TBD				Original due date was 09/30/2024. Date change approved via email by Janelle on 09/25/2024.	
5.1	.4	.4	Data Management Plan (if applicable to the study)	TBD				Original due date was 09/30/2024. Date change approved via email by Janelle on 09/25/2024.	
5.1	.4	.6	Data sharing agreement or memorandum of understanding (optional)	4/25/2025					
5.1	.4	.7	Draft Research Report	11/30/2025					
5.1	.4	.8	Draft Research Report	11/30/2026					

5.1	.5	.5	*	TBD							
5.1	.5	.5	*	TBD Year 3 or later	TBD						
5.1	.5	.1		Concept Paper	TBD						
5.1	.5	.2		Proposal	TBD						
5.1	.5	.3		Notice of IRB approval or exemption	TBD						
5.1	.5	.4		Data Management Plan (if applicable to the study)	TBD						
5.1	.5	.5		OMB clearance package (if applicable to the study)	TBD						
5.1	.5	.6		Data sharing agreement or memorandum of understanding (optional)	TBD						
5.1	.5	.7		Research Report	TBD						
5.1	.6	.*		TBD							
5.1	.6	.*		TBD Year 3 or later	TBD						
5.1	.6	.1		Concept Paper	TBD						
5.1	.6	.2		Proposal	TBD						
5.1	.6	.3		Notice of IRB approval or exemption	TBD						
5.1	.6	.4		Data Management Plan (if applicable to the study)	TBD						
5.1	.6	.5		OMB clearance package (if applicable to the study)	TBD						
5.1	.6	.6		Data sharing agreement or memorandum of understanding (optional)	TBD						
5.1	.6	.7		Applied research written product	TBD						
5.2	.*	.*		Toolkit Design: Assisting Students Struggling with Reading: Response to Intervention and Multi-tier Intervention in Primary Grades Marcia Kosanovich							
5.2	.1	.2		Proposal Toolkit Development	3/31/2022	3/31/2022	7/14/2023	7/29/2022			1
5.2	.1	.3		Toolkit	1/31/2024	1/12/2024	7/3/2024	8/29/2025			1
5.2	.1	.4		Memo Documenting changes based on usability testing	7/1/2024	7/1/2024	7/3/2024	9/15/2024			1
5.4	.*	.*		Develop Tools to Support Research Processes and Research-Based Practices.							
5.4	.1	.*		MS Adolescent Literacy PLC							
5.4	.1	.1		Concept Paper	TBD	4/11/23	4/21/23				1
5.4	.1	.2		Proposal	TBD	7/10/23	9/18/23				1
5.4	.1	.3		Draft Tool	8/31/2025	3/28/24	4/26/24				
5.4	.1	.4		Final Tool	8/31/2026						

5.4	.2	.1	*	PLC: Early Childhood Administrators Supporting Emergent Literacy (PLC-ECA)							
5.4	.2	.1		Concept Paper	6/28/24	6/4/24	6/17/24				
5.4	.2	.2		Proposal	8/9/24	8/9/24				Original due date was 07/31/2024. Date change approved via email by Janelle on 07/31/2024.	
5.4	.2	.5	.1	Sessions 1-3 and Session A Materials and Videos	2/28/25						
5.4	.2	.5	.2	Sessions 4-10 and Session B Materials and Videos	3/31/25						
5.4	.2	.5	.3	Sessions 11-15 Materials and Videos	4/30/25						
5.4	.2	.5	.4	Sessions 16-20 and Session C Materials and Videos	5/30/25						
5.4	.2	.5	.5	Usability testing and revisions memo	10/31/25						
5.4	.2	.3		Draft Tool	11/28/2025						
5.4	.2	.4		Final Tool	11/30/2026						
5.5				Conduct assessment of research study quality for ESSA compliance							
5.5	.1	.1		Concept Paper	As needed						
5.5	.2	.1		Proposal	As proposed						
5.5	.3	.1		Study review(s), peer reviewed by WWC contractor if reviewed using WWC standards	As proposed						
5.5	.4	.1		Summary memo and/or associated materials stakeholders	As proposed						
TASK 6 - Dissemination											
6.1				Develop website content							
				N/A							
6.2				Develop Dissemination Materials							
				Infographics/Factsheets							
6.2	.1	.1		Infographic 1- SCAL4GA Exploring Relationship between School Climate and School Literacy	12/31/2022	7/28/2023	9/12/2023	5/20/2023		0	
6.2	.1	.2		Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic	6/13/2022	6/17/2022	7/6/2022	6/30/2022		0	

6.2	.1	.3	Effectiveness of Early Literacy Instruction: Summary of 20 Years of Research Infographic Factsheet	6/13/2022	6/17/2022	7/6/2022			0
6.2	.1	.4	Improving Adolescent Literacy Infographic	TBD	7/7/2023	07/13//2024			1
6.2	.1	.5	Evidence Based Practices for Emergent Literacy Infographic	TBD	7/14/2023	7/19/2023			1
6.2	.1	.6	Supporting Facilitators Implementing the PLC EL Infographic	TBD	7/13/2023	7/24/2023			1
6.2	.1	.7	Supporting Your Child's Emergent Literacy at Home Infographic	10/31/2024				NEW Concept approved by Janelle via email on 6/12/24	
6.2	.1	.8	Infographic/factsheet 8	TBD	9/18/2024				
6.2	.1	.9	Infographic/factsheet 9	TBD					
6.2	.1	.10	Infographic/factsheet 10	TBD					
6.2	.1	.11	Infographic/factsheet 11	TBD					
6.2	.1	.12	Infographic/factsheet 12	TBD					
6.2	.1	.13	Infographic/factsheet 13	TBD					
			Audio Files						
6.2	.2	.1	Proposal	As needed					
6.2	.2	.2	Script for audio file 1	TBD					
6.2	.2	.3	Audio file 1	TBD					
6.2	.2	.1	Proposal	As needed					
6.2	.2	.2	Script for audio file 2	TBD					
6.2	.2	.3	Audio file 2	TBD					
6.2	.2	.1	Proposal	As needed					
6.2	.2	.2	Script for audio file 3	TBD					
6.2	.2	.3	Audio file 3	TBD					
			Videos						
6.2	.3	.1	Proposal	As needed	10/10/2023	10/19/2023			1
6.2	.3	.2	Script and storyboard for video 1	TBD					
6.2	.3	.3	Video 1	TBD					
6.2	.3	.1	Proposal	As needed					
6.2	.3	.2	Script and storyboard for video 2	TBD					
6.2	.3	.3	Video 2	TBD					
6.2	.3	.1	Proposal	As needed					
6.2	.3	.2	Script and storyboard for video 3	TBD					
6.2	.3	.3	Video 3	TBD					
6.2	.3	.1	Proposal	As needed					

6.2	.3	.2	.4	Script and storyboard for video 4	TBD						
6.2	.3	.3	.4	Video 4	TBD						
6.3				Host events and conference presentations							
6.3	.1	.1		SSSR EL SRG	TBD	5/13/2022	5/19/2022	TBD			1
6.3	.2	.1		Agenda and materials	2 weeks before event	6/28/2022	6/30/2022	TBD			1
6.3	.3	.1		Stakeholder feedback survey	2 weeks after event	7/28/2022	7/29/2022	TBD			1
6.3	.1	.2		PAEC Teacher Guides	TBD	5/13/2022	5/19/2022	TBD			1
6.3	.2	.2		Agenda and materials	2 weeks before event	7/1/2022	7/12/2022	TBD			1
6.3	.3	.2		Stakeholder feedback survey	2 weeks after event			TBD			
6.3	.1	.3		CBE Summer Institute proposal	TBD	7/26/2022	7/27/2022	TBD			1
6.3	.2	.3		Agenda and materials	2 weeks before event	7/26/2022	7/27/2022	TBD			1
6.3	.3	.3		Stakeholder feedback survey	2 weeks after event	8/23/2022	8/26/2022	TBD			1
6.3	.1	.4		MS Literacy Association Conference	TBD	8/30/2022	9/6/2022	TBD			1
6.3	.2	.4		Agenda and materials	2 weeks before event	11/15/2022	11/21/2022	TBD			1
6.3	.3	.4		Stakeholder feedback survey	2 weeks after event	12/16/2022	12/30/2022	TBD			1
6.3	.1	.5		FL Association of Teacher Educators Conference	TBD	8/30/2022	9/6/2022	TBD			1
6.3	.2	.5		Agenda and materials	2 weeks before event	11/16/2022	11/19/2022	TBD			1
6.3	.3	.5		Stakeholder feedback survey	2 weeks after event			TBD			
6.3	.1	.6		Proposal for MS Literacy Association Conference	TBD	9/19/2023	10/27/2023	TBD			1
6.3	.2	.6		Agenda and materials	2 weeks before event	11/6/2023	11/13/2023	TBD			1
6.3	.3	.6		Stakeholder feedback survey	2 weeks after event			TBD			
6.3	.1	.7		AMTESOL conference proposal	TBD	12/15/2022	12/30/2022	TBD			1
6.3	.2	.7		Agenda and materials	2 weeks before event	1/13/2023	1/31/2023	TBD			1

6.3	.3	.7		Stakeholder feedback survey	2 weeks after event			TBD	No SFS will be completed for this event.	
6.3	.1	.8		HEC Literary Tools for Coaching proposal	TBD	3/2/2023	3/13/2023	TBD		1
6.3	.2	.8		Agenda and materials	2 weeks before event	3/24/2023	4/4/2023	TBD		1
6.3	.3	.8		Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.9		HEC - Teacher Guides Family Literacy proposal	TBD	4/11/2023	4/18/2023	TBD		1
6.3	.2	.9		Agenda and materials	2 weeks before event	5/23/2023	6/1/2023	TBD		1
6.3	.3	.9		Stakeholder feedback survey	2 weeks after event	6/26/2023	6/27/2023	TBD		1
6.3	.1	.10		PAEC Leadership Conference – REL SE Literacy Tools proposal	TBD	4/11/2023	4/17/2023	TBD		1
6.3	.2	.10		Agenda and materials	2 weeks before event	6/28/2023	7/7/2023	TBD		1
6.3	.3	.10		Stakeholder feedback survey	2 weeks after event	8/2/2023	8/11/2023	TBD		1
6.3	.1	.11		Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.11		Agenda and materials	2 weeks before event			TBD		
6.3	.3	.11		Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.12		Engaging Families in K-5 Math: A Toolkit Treat Proposal	As needed	8/25/2023	9/5/2023	TBD		1
6.3	.2	.12		Agenda and materials	2 weeks before event	9/5/2023	9/12/2023	TBD		1
6.3	.3	.12		Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.13		Florida Literacy Conference proposal	As needed	12/1/2023	12/8/2023	TBD		1
6.3	.2	.13		Agenda and materials	2 weeks before event	12/11/2023	12/14/2023	TBD		1
6.3	.3	.13		Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.14		Innovations through CBE	As needed	12/6/2023	12/13/2023	TBD		1
6.3	.2	.14		Agenda and materials	2 weeks before	1/24/2024	2/21/2024	TBD		1

				event					
6.3	.3	.14	Stakeholder feedback survey	2 weeks after event	3/7/2024		TBD		1
6.3	.1	.15	Literacy Reimagined Conference	As needed	1/12/2024	1/18/2024	TBD		1
6.3	.2	.15	Agenda and materials	2 weeks before event	2/7/2024	2/14/2024	TBD		1
6.3	.3	.15	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.16	Summer Reading Camps for JRF	As needed	11/29/2023	12/1/2023	TBD		1
6.3	.2	.16	Agenda and materials	2 weeks before event	12/14/2023	12/20/2023	TBD		1
6.3	.3	.16	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.17	Proposal UNA REL SE Tools for Teacher Prep	As needed	11/20/2023	11/27/2023	TBD		1
6.3	.2	.17	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.17	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.18	Heartland Consortium Event	As needed	3/19/2024	3/27/2024	TBD		1
6.3	.2	.18	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.18	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.19	Summer Reading Camps for PAEC	As needed	2/6/2024	2/8/2024	TBD		1
6.3	.2	.19	Agenda and materials	2 weeks before event	2/6/2024	2/8/2024	TBD		
6.3	.3	.19	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.20	Proposal for Nassau county event	As needed	5/22/2024	5/24/2024	TBD		1
6.3	.2	.20	Agenda and materials	2 weeks before event	7/10/2024	7/16/2024	TBD		
6.3	.3	.20	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.21	Proposal for PAEC Event	As needed	3/20/2024	3/25/2024	TBD		1
6.3	.2	.21	Agenda and materials	2 weeks before event	4/8/2024	4/16/2024	TBD		1
6.3	.3	.21	Stakeholder feedback survey	2 weeks after event			TBD		

6.3	.1	.22	Proposal for MDE Literacy Coaches	As needed	4/15/2024		TBD		1
6.3	.2	.22	Agenda and materials	2 weeks before event	4/17/2024	4/18/2024	TBD		
6.3	.3	.22	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.23	Proposal for Summer PAEC Event	As needed	5/14/2024	5/23/2024	TBD		1
6.3	.2	.23	Agenda and materials	2 weeks before event	6/18/2024	6/25/2024	TBD		
6.3	.3	.23	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.24	Proposal for Aurora Conference	As needed	6/4/2024	6/7/2024	TBD		
6.3	.2	.24	Agenda and materials	2 weeks before event	10/3/2024	10/9/2024	TBD		
6.3	.3	.24	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.25	Proposal for event or required proposal for conference presentation	As needed	9/17/2024	9/25/2024	TBD		
6.3	.2	.25	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.25	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.26	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.26	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.26	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.27	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.27	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.27	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.28	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.28	Agenda and materials	2 weeks before event			TBD		

6.3	.3	.28	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.29	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.29	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.29	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.30	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.30	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.30	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.31	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.31	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.31	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.32	Proposal for ALSDE School Improvement Event	9/27/2024	9/24/2024	9/25/2024	TBD		1
6.3	.2	.32	Agenda and materials	1/31/2025			TBD	ALSDE Requested shift to winter	
6.3	.3	.32	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.33	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.33	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.33	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.34	Proposal for event or required proposal for conference presentation	As needed			TBD		
6.3	.2	.34	Agenda and materials	2 weeks before event			TBD		
6.3	.3	.34	Stakeholder feedback survey	2 weeks after event			TBD		
6.3	.1	.35	Proposal for event or required proposal for	As needed			TBD		

			conference presentation					
6.3	.2	.35	Agenda and materials	2 weeks before event			TBD	
6.3	.3	.35	Stakeholder feedback survey	2 weeks after event			TBD	
6.3	.1	.36	Proposal for event or required proposal for conference presentation	As needed			TBD	
6.3	.2	.36	Agenda and materials	2 weeks before event			TBD	
6.3	.3	.36	Stakeholder feedback survey	2 weeks after event			TBD	
6.3	.1	.37	Proposal for event or required proposal for conference presentation	As needed			TBD	
6.3	.2	.37	Agenda and materials	2 weeks before event			TBD	
6.3	.3	.37	Stakeholder feedback survey	2 weeks after event			TBD	
6.3	.1	.38	Proposal for event or required proposal for conference presentation	As needed			TBD	
6.3	.2	.38	Agenda and materials	2 weeks before event			TBD	
6.3	.3	.38	Stakeholder feedback survey	2 weeks after event			TBD	
6.4			Newsletters					
6.4	.1	.1	Newsletter 1 April 2022	3/18/2022	3/22/2022	3/28/2021	4/1/2022	0
6.4	.1	.2	Newsletter 2 May 2022	4/15/2022	4/15/2022	4/19/2022	4/29/2022	1
6.4	.1	.3	Newsletter 3 June 2022	5/20/2022	5/17/2022	5/19/2022	6/3/2022	1
6.4	.1	.4	Newsletter 4 July 2022	6/17/2022	6/17/2022	6/28/2022	7/1/2022	1
6.4	.1	.5	Newsletter 5 Aug 2022	7/15/2022	7/11/2022	7/12/2022	7/29/2022	1
6.4	.1	.6	Newsletter 6 Sept 2022	8/19/2022	8/19/2022	8/26/2022	9/2/2022	1
6.4	.1	.7	Newsletter 7 Oct 2022	9/16/2022	9/15/2022	9/16/2022	9/30/2022	1
6.4	.1	.8	Newsletter 8 Nov 2022	10/14/2022	10/14/2022	10/20/2022	10/28/2022	1
6.4	.1	.9	Newsletter 9 Dec 2022	11/18/2022	11/18/2022	12/5/2022	12/2/2022	1
6.4	.1	.10	Newsletter 10 Jan 2023	12/16/2022	12/9/2022	12/20/2022	12/30/2022	1
6.4	.1	.11	Newsletter 11 Feb 2023	1/20/2023	1/19/2023	2/3/2023	2/3/2023	1
6.4	.1	.12	Newsletter 12 March 2023	2/17/2023	2/13/2023	2/22/2023	3/3/2023	1
6.4	.1	.13	Newsletter 13 April 2023	3/17/2023	3/16/2023	4/4/2023	3/31/2023	1
6.4	.1	.14	Newsletter 14 May 2023	4/21/2023	4/18/2023	4/28/2023	5/5/2023	1
6.4	.1	.15	Newsletter 15 June 2023	5/19/2023	5/17/2023	5/18/2023	6/2/2023	1
6.4	.1	.16	Newsletter 16 July 2023	6/23/2023	6/23/2023	7/5/2023	7/7/2023	1

6.4	.1	.17	Newsletter 17 August 2023	7/31/2023	7/19/2023	7/19/2023	8/14/2023		1
6.4	.1	.18	Newsletter 18 Sept 2023	8/31/2023	8/7/2023	8/11/2023	9/14/2023		1
6.4	.1	.19	Newsletter 19 Oct 2023	9/30/2023	9/11/2023	9/15/2023	10/14/2023		1
6.4	.1	.20	Newsletter 20 Nov 2023	10/31/2023	10/10/2023	10/26/2023	11/14/2023		1
6.4	.1	.21	Newsletter 21 Dec 2023	11/30/2023	11/20/2023	11/28/2023	12/14/2023		1
6.4	.1	.22	Newsletter 22 Jan 2024	12/8/2023	12/12/2023	1/17/2024	12/22/2023		0
6.4	.1	.23	Newsletter 22 Feb 2024	1/19/2024	1/24/2024	2/12/2024	2/2/2024		0
6.4	.1	.24	Newsletter 24 March 2024	2/15/2024	2/15/2024	2/28/2024	2/29/2024		1
6.4	.1	.25	Newsletter 25 April 2024	3/15/2024	3/15/2024	3/25/2024	3/29/2024		1
6.4	.1	.26	Newsletter 26 May 2024	4/16/2024	4/16/2024	5/9/2024	4/30/2024		1
6.4	.1	.27	Newsletter 27 June 2024 August 2024	7/19/2024	7/9/2024	7/16/2024	8/2/2024	Revised schedule approved per Janelle's email on 5/3/24	1
6.4	.1	.28	Newsletter 28 July 2024 November 2024	10/17/2024	10/3/2024		10/31/2024		1
6.4	.1	.29	Newsletter 29 August 2024 February 2025	1/17/2025			1/31/2025		
6.4	.1	.30	Newsletter 30 Sept 2024 May 2025	4/16/2025			4/30/2025		
6.4	.1	.31	Newsletter 31 Oct 2024 August 2025	7/17/2025			7/31/2025		
6.4	.1	.32	Newsletter 32 Nov 2024 November 2025	10/17/2025			10/31/2025		
6.4	.1	.33	Newsletter 33 Dec 2024 February 2026	1/16/2026			1/30/2026		
6.5			Maintain a blog						
6.5	.1	.1	Blog 1	4/29/2022	4/20/2022	4/27/2022	5/13/2022		1
6.5	.1	.2	Blog 2	6/30/2022	6/29/2022	7/20/2022	7/14/2022		1
6.5	.1	.3	Blog 3	8/31/2022	8/23/2022	9/2/2022	9/14/2022		1
6.5	.1	.4	Blog 4	10/31/2022	10/17/2022	11/19/2022	11/14/2022		1
6.5	.1	.5	Blog 5	12/16/2022	12/14/2022	1/24/2023	12/30/2022		1
6.5	.1	.6	Blog 6	3/31/2023	3/27/2023	4/21/2023	4/14/2023	Originally due 02/28/2023. Date change to 03/31/2023 approved by Janelle via email on 02/16/2023.	1
6.5	.1	.7	Blog 7	4/28/2023	4/3/2023	4/28/2023	5/12/2023		1
6.5	.1	.8	Blog 8	6/30/2023	6/30/2023	7/27/2023	7/14/2023		1
6.5	.1	.9	Blog 9	10/6/2023	10/4/2023	10/18/2023	10/20/2023	Originally due 08/31/2023. Date change to 10/06/2023	1

									approved by Janelle via email on 09/05/2023.	
6.5	.1	.10	Blog 10	10/31/2023	10/10/2023	10/27/2023	11/14/2023			1
6.5	.1	.11	Blog 11	12/15/2023	11/28/2023	12/7/2023	12/29/2023			1
6.5	.1	.12	Blog 12	2/28/2024	2/13/2024	2/29/2024	3/13/2024			1
6.5	.1	.13	Blog 13	4/30/2024	4/3/2024	5/1/2024	5/14/2024			1
6.5	.1	.14	Blog 14	6/30/2024	6/13/2024	6/26/2024	7/14/2024			1
6.5	.1	.15	Blog 15	8/30/2024	8/28/2024	9/10/2024	9/13/2024			1
6.5	.1	.16	Blog 16	10/31/2024				11/14/2024		
6.5	.1	.17	Blog 17	2/28/2025				3/14/2025		
6.5	.1	.18	Blog 18	4/30/2025						
6.5	.1	.19	Blog 19	6/30/2025						
6.5	.1	.20	Blog 20	8/31/2025						
6.5	.1	.21	Blog 21	10/31/2025						
6.6			Maintain a social media presence							
6.6	.1	.1	Tweet 1 Year 1 Quarter 1	4/29/2022	4/18/2022	4/20/2022	5/13/2022			1
6.6	.1	.2	Tweet 2 Year 1 Quarter 2	7/29/2022	7/25/2022	7/27/2022	8/12/2022			1
6.6	.1	.3	Tweet 3 Year 1 Quarter 3	10/31/2022	10/4/2022	10/14/2022	11/14/2022			1
6.6	.1	.4	Tweet 4 Year 1 Quarter 4	1/31/2023	1/5/2023	1/17/2023	2/14/2023			1
6.6	.1	.5	Tweet 5 Year 2 Quarter 1	4/28/2023	4/4/2023	4/17/2023	5/12/2023			1
6.6	.1	.6	Tweet 6 Year 2 Quarter 2	7/31/2023	7/10/2023	7/12/2023	8/14/2023			1
6.6	.1	.7	Tweet 7 Year 2 Quarter 3	10/31/2023	10/10/2023	10/18/2023	11/14/2023			1
6.6	.1	.8	Tweet 8 Year 2 Quarter 4	1/31/2024	1/5/2024	1/10/2024	2/14/2024			1
6.6	.1	.9	Tweet 9 Year 3 Quarter 1	4/30/2024	4/2/2024	4/16/2024	5/14/2024			1
6.6	.1	.10	Tweet 10 Year 3 Quarter 2	7/31/2024	7/12/2024	7/16/2024	8/14/2024			1
6.6	.1	.11	Tweet 11 Year 3 Quarter 3	10/31/2024	10/1/2024	10/9/2024	11/14/2024			1
6.6	.1	.12	Tweet 12 Year 3 Quarter 4	1/31/2025				2/14/2025		
6.6	.1	.13	Tweet 13 Year 4 Quarter 1	4/30/2025				5/14/2025		
6.6	.1	.14	Tweet 14 Year 4 Quarter 2	7/31/2025				8/14/2025		
6.6	.1	.15	Tweet 15 Year 4 Quarter 3	10/31/2025				11/14/2025		
6.6	.1	.16	Tweet 16 Year 4 Quarter 4	1/31/2026				2/14/2026		
6.7			Branding Materials							
6.7	.1	.1	Proposal for video 1	As needed						
6.7	.1	.2	Script and storyboard for video 1	As needed						
6.7	.1	.3	Video 1	As needed						
6.7	.2	.1	Brochure or handout	As needed						
										497
										514
										0.96693



**Termination for Convenience**

**Memo to Contract File**

**February 13, 2025**

*(Fill in Date of this Memo)*

Contract # 91990022C0014 – REL-SE

Mod # P00009 (This is a unilateral mod)

       This is a commercial (FAR Part 12)        contract        order; the termination clause in the contract (including GSA schedule contracts) is 52.212-4

XX        This is a Part 15 contract; select from below list to indicate which T4C clause is in the contract:

- 52.249-1 Termination for Convenience of the Government (Fixed Price) (Short Form)
- 52.249-2 Termination for Convenience of the Government (Fixed-Price)
- 52.249-4 Termination for Convenience of the Government (Services) (Short Form)
- 52.249-5 Termination for Convenience of the Government (Educational and Other Nonprofit Institutions)
- XX        52.249-6 Termination for Convenience of the Government (Cost Reimbursement)

XX        The government's requirements have changed (i.e., there is no longer a need for the supplies or services), and as a result the Contracting Officer has determined that termination of this contract is in the best interest of the government.

Note: See Sample Mod Text (on the following pages, select mod text which corresponds to the termination clause authority you are using to execute the termination for convenience).

Upon execution of the mod CO/CS will complete FPDS-NG Contract Action Report.

Process steps after issuance of termination for convenience:

       Was a "no cost" mutual agreement reached, and a modification issued as evidence?

If applicable, receipt date of contractor's settlement proposal:       

If a "no cost" mutual settlement was not achieved, proceed to mutually agree on settlement amount. Follow FAR guidance. If mutual agreement cannot be reached, CO will proceed to issue a unilateral settlement determination modification. See following pages for sample settlement mod text.

## AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

CONTRACT NUMBER

PAGE NUMBER

1

1

2. AMENDMENT/MODIFICATION NO. P00009	3. EFFECTIVE DATE See Block 16C	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicable)
6. ISSUED BY US Department of Education 400 Maryland Avenue SW Washington DC 20202	CODE CAM	7. ADMINISTERED BY (If other than Item 6)	CODE
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) FLORIDA STATE UNIVERSITY (00027876) Attn: No Contact Available 874 TRADITIONS WAY TALLAHASSEE FL 323060001		(X) 9A. AMENDMENT OF SOLICITATION NO.	
		9B. DATED (SEE ITEM 11)	
		X 10A. MODIFICATION OF CONTRACT/ORDER NO. 91990022C0014	
		10B. DATED (SEE ITEM 13) 01/24/2022	
CODE JF2BLNN4PJC3	FACILITY CODE		

## 11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning \_\_\_\_\_ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

## 12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

## 13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D. OTHER (Specify type of modification and authority) 52.249-6, Termination Cost-Reimbursement

E. IMPORTANT: Contractor  is not.  is required to sign this document and return \_\_\_\_\_ copies to the issuing office.

## 14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

UEI: JF2BLNN4PJC3

Pursuant to clause FAR 52.249-6, Termination Cost-Reimbursement, this contract is hereby terminated effective 02/13/2025, in whole, for the Government's convenience. The contractor must stop all work immediately on the effective date, must immediately cause all of its suppliers and subcontractors to cease work, and proceed with any contractor obligations set forth in the referenced clause including submission of a final termination settlement proposal. Per the referenced clause, the contractor shall submit the proposal promptly, but no later than 1 year from the effective date of the termination, unless extended in writing by the Contracting Officer.

Period of Performance: 01/24/2022 to 02/13/2025

Except as provided herein, all terms and conditions of the document referenced in Item 9 A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)

16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)

Matthew Lucas

DN: cn=Matthew Lucas, EMAIL: matthew.lucas@ed.gov

Department of Education,  
Contracts and Acquisition  
Management,  
email=matthew.lucas@ed.gov, c=US  
Date:2025.02.13 16:48:57-05'00'  
(Contracting Officer)

15B. CONTRACTOR/OFFEROR

15C. DATE SIGNED

16C. DATE SIGNED

(Signature of person authorized to sign)

NSN 7540-01-152-8070

Previous edition unusable

STANDARD FORM 30 (REV. 10-83)

Prescribed by GSA

FAR (48 CFR) 52.249-6

ED 003739

**From:** [Emily Stivers](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Jessica Lambdin](#); [Rose Driber](#)  
**Subject:** Florida State University-DOE REL Project #91990022C0014 - IPP Invoice Reject/Denied Notification - Action Required for Payment Information Request  
**Date:** Thursday, April 3, 2025 4:38:42 PM  
**Attachments:** [image001.png](#)  
**Importance:** High

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You don't often get email from emily.stivers@fsu.edu. [Learn why this is important](#)

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good Afternoon Matthew,

I hope you are doing well. We have received the IPP Collector email informing us that invoice #0036 for project 91990022C0014, amounting to \$388,290.12, has been rejected. Upon logging into the system, the comments stated:

- The Year associated with the work on the invoice CLIN does not match the Year associated with the work in the attached documentation.
- The 900+ page attachment was not formatted in a manner that allows for review.

We have previously submitted invoices using the same CLINs and attachment formats, which were accepted without issue. Kindly advise us on how to correct the invoice, specify the appropriate CLINs to use, and provide guidance on the required formatting for the attachments, so that we may resubmit the invoice.

Your assistance with this urgent matter is greatly appreciated,



**Emily N. Stivers**  
***Sponsored Research Accounting Coordinator III***  
Florida State University  
(850) 644-8671  
[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)

---

**From:** [Gibbs, Joseph](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Griffin, Genesis](#)  
**Subject:** FW: Settlement - 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 1:57:30 PM  
**Attachments:** [Southeast - 91990022C0014.docx](#)  
**Importance:** High

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**From:** Gibbs, Joseph  
**Sent:** Tuesday, March 18, 2025 2:47 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** Settlement - 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good afternoon Rose,

Please find attached the Settlement information for REL Southeast and confirm receipt at your earliest convenience. I hope the information attached is helpful.

Thank you,

Joe

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)

U.S. Department of Education  
Email Address: [mattthew.lucas@ed.gov](mailto:mattthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



Rose Dribber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdribber@fsu.edu](mailto:rdribber@fsu.edu)

---

**From:** Rose Dribber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Tuesday, February 25, 2025 11:05 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,

**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*



Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>

**Sent:** Tuesday, February 18, 2025 10:09 AM

**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)

**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>

**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
3. In reference to section (c)(6), is there any project information/deliverables that FSU should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?
4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?

5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?
6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Sands, Janelle](#); [Nicole Patton-Terry](#)  
**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Tuesday, February 18, 2025 10:08:41 AM

---

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
3. In reference to section (c)(6), is there any project information/deliverables that FSU should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?
4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?
5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?

6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer

Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** [Soldner, Matthew](#)  
**To:** [Lucas, Matthew](#); [Brasiel, Sarah](#)  
**Cc:** [Griffin, Genesis](#); [Gibbs, Joseph](#)  
**Subject:** RE: 91990022C0014 Regional Education Laboratory (Florida State University)  
**Date:** Wednesday, April 9, 2025 3:16:31 PM

---

Hi, all!

In case Sarah doesn't see this by your deadline, Matt L.:

Data that does not include personally identifiable information (PII) may be sent in the clear via FSU's file transfer system. Data that includes PII **may not** be transferred via FSU's system **unless** it is (1) encrypted via WinZip prior to uploading, (2) appropriately marked, and (3) the decryption password is sent in a separate email to Sarah Brasiel (or is communicated directly to her via telephone). If this is not possible, please contact IES for additional instructions.

Matt

---

Matthew E. Soldner  
Acting Director  
Institute of Education Sciences

---

**From:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Sent:** Wednesday, April 9, 2025 2:45 PM  
**To:** Brasiel, Sarah <Sarah.Brasiel@ed.gov>  
**Cc:** Soldner, Matthew <Matthew.Soldner@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>  
**Subject:** 91990022C0014 Regional Education Laboratory (Florida State University)

Good Afternoon Sarah,

The contractor reached out to me regarding the deliverables for January and February. The contractor had the following question:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.

Is the Department able to use the contractor's FTP site for the data transfer? I am seeking a provide

the vendor direction regarding the FTP today, 04/09 as I am under a tight deadline to settle the termination. I have included the request for information that went out after the termination for reference. Thank you for your help.

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Griffin, Genesis](#)  
**To:** [Soldner, Matthew](#); [Lucas, Matthew](#); [Brasiel, Sarah](#)  
**Cc:** [Gibbs, Joseph](#)  
**Subject:** RE: 91990022C0014 Regional Education Laboratory (Florida State University)  
**Date:** Wednesday, April 9, 2025 3:43:32 PM  
**Attachments:** [image001.png](#)

---

Good afternoon, Matthew S:

Thank you. We appreciate the quick response.

Genesis B. Griffin  
Director/Chief of the Contracting Office  
Contracts and Acquisitions Management (CAM) Program Contracts Group (PCG)  
Office of Acquisitions Management (OAM)  
U.S. Department of Education  
Email: [genesis.griffin@ed.gov](mailto:genesis.griffin@ed.gov)  
Office Phone: (202) 453-7816  
Mobile Number: (202) 320-1228



---

**From:** Soldner, Matthew <Matthew.Soldner@ed.gov>  
**Sent:** Wednesday, April 9, 2025 3:16 PM  
**To:** Lucas, Matthew <Matthew.Lucas@ed.gov>; Brasiel, Sarah <Sarah.Brasiel@ed.gov>  
**Cc:** Griffin, Genesis <Genesis.Griffin@ed.gov>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>  
**Subject:** RE: 91990022C0014 Regional Education Laboratory (Florida State University)

Hi, all!

In case Sarah doesn't see this by your deadline, Matt L.:

Data that does not include personally identifiable information (PII) may be sent in the clear via FSU's file transfer system. Data that includes PII **may not** be transferred via FSU's system **unless** it is (1) encrypted via WinZip prior to uploading, (2) appropriately marked, and (3) the decryption password is sent in a separate email to Sarah Brasiel (or is communicated directly to her via telephone). If this is not possible, please contact IES for additional instructions.

Matt

---

Matthew E. Soldner  
Acting Director  
Institute of Education Sciences

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Wednesday, April 9, 2025 2:45 PM  
**To:** Brasiel, Sarah <[Sarah.Brasiel@ed.gov](mailto:Sarah.Brasiel@ed.gov)>  
**Cc:** Soldner, Matthew <[Matthew.Soldner@ed.gov](mailto:Matthew.Soldner@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** 91990022C0014 Regional Education Laboratory (Florida State University)

Good Afternoon Sarah,

The contractor reached out to me regarding the deliverables for January and February. The contractor had the following question:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.

Is the Department able to use the contractor's FTP site for the data transfer? I am seeking a provide the vendor direction regarding the FTP today, 04/09 as I am under a tight deadline to settle the termination. I have included the request for information that went out after the termination for reference. Thank you for your help.

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839



**From:** [Lucas, Matthew](#)  
**To:** [Rose Driber](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#); [Griffin, Genesis](#); [Jennifer Epstein](#); [Emily Stivers](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 4:10:00 PM

---

Good Afternoon Rose,

Thank you, I have some guidance regarding the FTP.

Data that does not include personally identifiable information (PII) may be sent in the clear via FSU's file transfer system. Data that includes PII **may not** be transferred via FSU's system **unless** it is (1) encrypted via WinZip prior to uploading, (2) appropriately marked, and (3) the decryption password is sent in a separate email to Sarah Brasiel (or is communicated directly to her via telephone). If this is not possible, please contact IES for additional instructions.

I would like to be made aware if you need additional instructions as I can work with Sarah in obtaining that. Are we on target for a proposal for tomorrow?

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <rdriber@fsu.edu>  
**Sent:** Wednesday, April 9, 2025 3:35 PM  
**To:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>; Jennifer Epstein <jennifer.epstein@fsu.edu>; Emily Stivers <emily.stivers@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good afternoon Matt,

Thanks for looking into the data transfer issue. I just received some additional information for your consideration.

The Toolkit files include videos that are too large for NIFTY at 29 Gigs (we have a 3 Gig file size limit per file). One way we did this with Janelle was to upload them to YouTube where she could access them but not sure if that is an option.

Let me know what else you learn and we'll figure out the best way to handle this file transfer.

Thanks again,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Wednesday, April 9, 2025 3:20 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Afternoon Rose,

Thank you for the follow up. I am working on the FTP site and whether the Department can use yours or if we have one that could be used. I hope to have an answer shortly. In regard to your second question, when we settle the termination, a final invoice will be submitted into IPP as I understand it. I don't expect to need the SF-1034. As we discussed, it is expected that your settlement proposal will include work completed and invoice (potentially rejected), work completed uninvoiced and work partially completed (percent). The normal format that is submitted into IPP will suffice. In terms of standard back up, yes, excel, word and PDF documents are acceptable. If you have your prior submitted invoices for completed work that have been rejected as part of the settlement package that would be useful. As you are aware the SF 1437 is somewhat limited on its ability to communicate detail need to settle this requirement, it is built for a top-level summary. It should be used from that standpoint would be my recommendation.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Wednesday, April 9, 2025 11:59 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Matthew,

Thank you for speaking with me yesterday. Preparation of this information within the timeframe indicated in your email below is our top priority.

I wanted to ask two clarifying questions:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.
2. Since we won't be submitting via the IPP system, I wanted to also confirm that we may submit the invoices (one for amounts previously invoiced, but not paid – our January invoice, one for amounts not previously invoiced – Feb 1-13, and one for post-termination settlement costs), using the SF-1034 form, along with the standard backup documentation and deliverables in Excel, Word and PDF? Would the SF-1034 accompany/support the SF 1437 for the post-termination settlement costs, or should

just the SF1437 be used for that period?

Thank you for your time,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Tuesday, April 8, 2025 1:43 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.
5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later

than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,

Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University



(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in

the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It's been challenging to know where to get what limited information is available.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber

**Sent:** Tuesday, February 25, 2025 11:05 AM

**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)

**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>

**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>

**Sent:** Tuesday, February 18, 2025 10:09 AM

**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)

**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>

**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
3. In reference to section (c)(6), is there any project information/deliverables that FSU should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?
4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?
5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?
6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdrider@fsu.edu](mailto:rdrider@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdrider@fsu.edu](mailto:rdrider@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [mattthew.lucas@ed.gov](mailto:mattthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#); [Griffin, Genesis](#); [Jennifer Epstein](#); [Emily Stivers](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 3:35:01 PM

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Good afternoon Matt,

Thanks for looking into the data transfer issue. I just received some additional information for your consideration.

The Toolkit files include videos that are too large for NIFTY at 29 Gigs (we have a 3 Gig file size limit per file). One way we did this with Janelle was to upload them to YouTube where she could access them but not sure if that is an option.

Let me know what else you learn and we'll figure out the best way to handle this file transfer.

Thanks again,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Sent:** Wednesday, April 9, 2025 3:20 PM  
**To:** Rose Driber <rdriber@fsu.edu>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>; Jennifer Epstein <jennifer.epstein@fsu.edu>; Emily Stivers <emily.stivers@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Afternoon Rose,

Thank you for the follow up. I am working on the FTP site and whether the Department can use yours or if we have one that could be used. I hope to have an answer shortly. In regard to your second question, when we settle the termination, a final invoice will be submitted into IPP as I understand it.

I don't expect to need the SF-1034. As we discussed, it is expected that your settlement proposal will include work completed and invoice (potentially rejected), work completed uninvoiced and work partially completed (percent). The normal format that is submitted into IPP will suffice. In terms of standard back up, yes, excel, word and PDF documents are acceptable. If you have your prior submitted invoices for completed work that have been rejected as part of the settlement package that would be useful. As you are aware the SF 1437 is somewhat limited on its ability to communicate detail need to settle this requirement, it is built for a top-level summary. It should be used from that standpoint would be my recommendation.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>

**Sent:** Wednesday, April 9, 2025 11:59 AM

**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>

**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>

**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good morning Matthew,

Thank you for speaking with me yesterday. Preparation of this information within the timeframe indicated in your email below is our top priority.

I wanted to ask two clarifying questions:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to

submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.

2. Since we won't be submitting via the IPP system, I wanted to also confirm that we may submit the invoices (one for amounts previously invoiced, but not paid – our January invoice, one for amounts not previously invoiced – Feb 1-13, and one for post-termination settlement costs), using the SF-1034 form, along with the standard backup documentation and deliverables in Excel, Word and PDF? Would the SF-1034 accompany/support the SF 1437 for the post-termination settlement costs, or should just the SF1437 be used for that period?

Thank you for your time,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
 Florida State University  
 (850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Tuesday, April 8, 2025 1:43 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.

5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and

will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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unless you recognize the sender and know the content is safe.

Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdrider@fsu.edu](mailto:rdrider@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I’m following up again in case it is helpful to you, and also in the hopes of reducing FSU’s risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,

Rose Driber, MPA, CRA



**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Tuesday, February 25, 2025 11:05 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Tuesday, February 18, 2025 10:09 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
3. In reference to section (c)(6), is there any project information/deliverables that FSU should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?
4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?
5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?
6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be

a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Lucas, Matthew](#)  
**To:** [Rose Driber](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#); [Griffin, Genesis](#); [Jennifer Epstein](#); [Emily Stivers](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 3:19:00 PM

---

Good Afternoon Rose,

Thank you for the follow up. I am working on the FTP site and whether the Department can use yours or if we have one that could be used. I hope to have an answer shortly. In regard to your second question, when we settle the termination, a final invoice will be submitted into IPP as I understand it. I don't expect to need the SF-1034. As we discussed, it is expected that your settlement proposal will include work completed and invoice (potentially rejected), work completed un invoiced and work partially completed (percent). The normal format that is submitted into IPP will suffice. In terms of standard back up, yes, excel, word and PDF documents are acceptable. If you have your prior submitted invoices for completed work that have been rejected as part of the settlement package that would be useful. As you are aware the SF 1437 is somewhat limited on its ability to communicate detail need to settle this requirement, it is built for a top-level summary. It should be used from that standpoint would be my recommendation.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <rdriber@fsu.edu>  
**Sent:** Wednesday, April 9, 2025 11:59 AM  
**To:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>; Jennifer Epstein <jennifer.epstein@fsu.edu>; Emily Stivers <emily.stivers@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good morning Matthew,

Thank you for speaking with me yesterday. Preparation of this information within the timeframe indicated in your email below is our top priority.

I wanted to ask two clarifying questions:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.
2. Since we won't be submitting via the IPP system, I wanted to also confirm that we may submit the invoices (one for amounts previously invoiced, but not paid – our January invoice, one for amounts not previously invoiced – Feb 1-13, and one for post-termination settlement costs), using the SF-1034 form, along with the standard backup documentation and deliverables in Excel, Word and PDF? Would the SF-1034 accompany/support the SF 1437 for the post-termination settlement costs, or should just the SF1437 be used for that period?

Thank you for your time,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Tuesday, April 8, 2025 1:43 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.
5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)

U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



Rose Dribber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdribber@fsu.edu](mailto:rdribber@fsu.edu)

---

**From:** Rose Dribber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Tuesday, February 25, 2025 11:05 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,

**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*



Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>

**Sent:** Tuesday, February 18, 2025 10:09 AM

**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)

**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>

**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
3. In reference to section (c)(6), is there any project information/deliverables that FSU should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?
4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?

5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?
6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Sands, Janelle](#); [Nicole Patton-Terry](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, March 12, 2025 11:52:29 AM

---

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Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** Matthew.Lucas@ed.gov  
**Cc:** Janelle.Sands@ed.gov; Nicole Patton-Terry <npattonterry@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Tuesday, February 25, 2025 11:05 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Tuesday, February 18, 2025 10:09 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

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  - a. Do you have any other expectations for right, title and interest in the subcontracts terminated?
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The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)

Contracts and Acquisitions Management (CAM)

Office of Acquisition Management (OAM)

U.S. Department of Education

Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)

Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#); [Griffin, Genesis](#); [Jennifer Epstein](#); [Emily Stivers](#); [John Hughes](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 4:55:34 PM

---

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Dear Matthew,

We should be able to submit the deliverable information without including PII. We are also on target for proposal submission tomorrow.

Just as a heads up, FSU's file transfer system allows 3GB to be transferred at a time, so you'll receive several file transfers. The files are available for 20 days.

Have a lovely evening and we'll be in close contact tomorrow.

Kind regards,



**Rose Driber, MPA, CRA**  
**Associate Director, Pre-Award**  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Sent:** Wednesday, April 9, 2025 4:11 PM  
**To:** Rose Driber <rdriber@fsu.edu>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>; Jennifer Epstein <jennifer.epstein@fsu.edu>; Emily Stivers <emily.stivers@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Afternoon Rose,

Thank you, I have some guidance regarding the FTP.

Data that does not include personally identifiable information (PII) may be sent in the clear via FSU's file transfer system. Data that includes PII **may not** be transferred via FSU's system **unless** it is (1)

encrypted via WinZip prior to uploading, (2) appropriately marked, and (3) the decryption password is sent in a separate email to Sarah Brasiel (or is communicated directly to her via telephone). If this is not possible, please contact IES for additional instructions.

I would like to be made aware if you need additional instructions as I can work with Sarah in obtaining that. Are we on target for a proposal for tomorrow?

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Sent:** Wednesday, April 9, 2025 3:35 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good afternoon Matt,

Thanks for looking into the data transfer issue. I just received some additional information for your consideration.

The Toolkit files include videos that are too large for NIFTY at 29 Gigs (we have a 3 Gig file size limit per file). One way we did this with Janelle was to upload them to YouTube where she could access them but not sure if that is an option.

Let me know what else you learn and we'll figure out the best way to handle this file transfer.

Thanks again,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Wednesday, April 9, 2025 3:20 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Afternoon Rose,

Thank you for the follow up. I am working on the FTP site and whether the Department can use yours or if we have one that could be used. I hope to have an answer shortly. In regard to your second question, when we settle the termination, a final invoice will be submitted into IPP as I understand it. I don't expect to need the SF-1034. As we discussed, it is expected that your settlement proposal will include work completed and invoice (potentially rejected), work completed un invoiced and work partially completed (percent). The normal format that is submitted into IPP will suffice. In terms of standard back up, yes, excel, word and PDF documents are acceptable. If you have your prior submitted invoices for completed work that have been rejected as part of the settlement package that would be useful. As you are aware the SF 1437 is somewhat limited on its ability to communicate detail need to settle this requirement, it is built for a top-level summary. It should be used from that standpoint would be my recommendation.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>

**Sent:** Wednesday, April 9, 2025 11:59 AM

**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>

**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>; Jennifer Epstein <[jennifer.epstein@fsu.edu](mailto:jennifer.epstein@fsu.edu)>; Emily Stivers <[emily.stivers@fsu.edu](mailto:emily.stivers@fsu.edu)>

**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Matthew,

Thank you for speaking with me yesterday. Preparation of this information within the timeframe indicated in your email below is our top priority.

I wanted to ask two clarifying questions:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.
2. Since we won't be submitting via the IPP system, I wanted to also confirm that we may submit the invoices (one for amounts previously invoiced, but not paid – our January invoice, one for amounts not previously invoiced – Feb 1-13, and one for post-termination settlement costs), using the SF-1034 form, along with the standard backup documentation and deliverables in Excel, Word and PDF? Would the SF-1034 accompany/support the SF 1437 for the post-termination settlement costs, or should just the SF1437 be used for that period?

Thank you for your time,



**Rose Driber, MPA, CRA**  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Tuesday, April 8, 2025 1:43 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>; Griffin, Genesis <[Genesis.Griffin@ed.gov](mailto:Genesis.Griffin@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.
5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education

Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)

Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,  
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Matthew Lucas  
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Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



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*Associate Director, Pre-Award*  
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(850) 644-8652  
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**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
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**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
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**Importance:** High

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Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Dribber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Sands, Janelle](#); [Nicole Patton-Terry](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Tuesday, February 25, 2025 11:05:00 AM

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**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); [Nicole.Patton-Terry@fsu.edu](mailto:Nicole.Patton-Terry@fsu.edu)  
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**Sent:** Thursday, February 13, 2025 5:04 PM  
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**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

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Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [mattthew.lucas@ed.gov](mailto:mattthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Lucas, Matthew](#)  
**To:** ["Rose Driber"](#)  
**Cc:** ["Nicole Patton-Terry"](#); [Gibbs, Joseph](#); [Griffin, Genesis](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Tuesday, April 8, 2025 1:42:00 PM  
**Importance:** High

---

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.
5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,

Matt

Matthew Lucas  
 Contracting Officer  
 Program Contracts Group (PCG)  
 Contracts and Acquisitions Management (CAM)  
 Office of Acquisition Management (OAM)  
 U.S. Department of Education  
 Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
 Phone: 202-987-0839

---

**From:** Rose Dribber <rdribber@fsu.edu>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,



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**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Dribber <[rdribber@fsu.edu](mailto:rdribber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
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I wanted to confirm receipt.

Thank you,

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Program Contracts Group (PCG)  
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U.S. Department of Education  
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**To:** [Lucas, Matthew](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Monday, April 7, 2025 4:14:49 PM

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*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber

**Sent:** Tuesday, February 25, 2025 11:05 AM

**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)

**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>

**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

I hope this email finds you well. I wanted to touch base with you to regarding the termination settlement proposal that FSU is preparing in response to the termination notice received for contract 91990022C0014.

Our office has reviewed the guidance in FAR Subpart 49.3, as well as located the current version of the Settlement Proposal for Cost-Reimbursement Type Contracts (SF1437). While we pursue project shut down activities, we wanted to follow up with you regarding IES's expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

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**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Tuesday, February 18, 2025 10:09 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good morning Mr. Lucas,

FSU confirms receipt of the termination notice for the Regional Education Laboratory Southeast, contract 91990022C0014. While we regret that the project has terminated early, we are grateful for your guidance on next steps.

We did have a few questions regarding the termination process and settlement proposal referenced in FAR 52.249-6 and Modification P00009. I can summarize them here, but if you are available for a call, I would be happy to talk with you.

1. Is the settlement proposal intended to be submitted as a projection of costs associated with shutting the project down, for your prior approval, or should it be submitted after all activities have been terminated?
  
2. In reference to section (c)(4), will the subcontract termination settlement agreements be submitted to your office directly, for your office to pay, or will they be submitted as part of the FSU settlement proposal and paid by FSU, in accordance with section (c)(5)?
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3. In reference to section (c)(6), is there any project information/deliverables that FSU

should send your office, or do you have any expectations regarding disposition, preservation or protection of any project information?

4. In reference to section (d), in the absence of any equipment purchased, is there anything FSU should include on a termination inventory schedule?
5. In reference to section (f), can you provide any guidance about the form and with what certification we should submit the settlement proposal?
6. In an effort to comply with the termination notice most efficiently, we are reviewing timeframes for two components of the project shutdown, programmatic and fiscal. Do you have any expectations for reasonable timeframes for shutdown activities in each area?

The FAR includes several references to the Contracting Officer's direction. I realize this may be a new situation for you all, as it most certainly is for FSU. Under the current circumstances, any clarification you can offer regarding to whom we should direct our termination inquiries and material would be appreciated.

Again, I appreciate your guidance and look forward to your response.

Kind regards,



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*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>

**Sent:** Thursday, February 13, 2025 5:04 PM

**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>

**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>

**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the

Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Sands, Janelle](#); [Nicole Patton-Terry](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, March 5, 2025 1:24:00 PM

---

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

Kind regards,



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**Sent:** Tuesday, February 25, 2025 11:05 AM  
**To:** Matthew.Lucas@ed.gov  
**Cc:** Janelle.Sands@ed.gov; Nicole Patton-Terry <npattonterry@fsu.edu>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Kind regards,



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*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

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**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Tuesday, February 18, 2025 10:09 AM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** FW: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Again, I appreciate your guidance and look forward to your response.

Kind regards,



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Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

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**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, February 13, 2025 5:04 PM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>; Staci Walton Duggar <[SDuggar@fsu.edu](mailto:SDuggar@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>  
**Subject:** Termination Notice 91990022C0014 P00009 Regional Education Laboratory

**Importance:** High

Hello Ms. Driber and Ms. Duggar,

Attached is a modification notifying you that the subject order has been terminated at the Government's convenience. You are encouraged to submit a proposal promptly. Please acknowledge receipt.

Thank you,  
Matthew M Lucas

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

**From:** [Rose Driber](#)  
**To:** [Lucas, Matthew](#)  
**Cc:** [Nicole Patton-Terry](#); [Gibbs, Joseph](#); [Griffin, Genesis](#); [Jennifer Epstein](#); [Emily Stivers](#)  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Date:** Wednesday, April 9, 2025 11:59:27 AM

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**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**

Good morning Matthew,

Thank you for speaking with me yesterday. Preparation of this information within the timeframe indicated in your email below is our top priority.

I wanted to ask two clarifying questions:

1. Regarding the submission of the deliverables for January, Feb (through 2/13), and the post-termination deliverables requested by Mr. Gibbs on 3/18/25 – this is going to be a sizeable amount of data that can't be transmitted via email. I understand we are not to submit via the IPP system, but rather one final package for all outstanding charges via email. FSU has a file transfer website called NiFTy that is accessible to outside users if that is acceptable to you. Otherwise, please let me know your preference.
2. Since we won't be submitting via the IPP system, I wanted to also confirm that we may submit the invoices (one for amounts previously invoiced, but not paid – our January invoice, one for amounts not previously invoiced – Feb 1-13, and one for post-termination settlement costs), using the SF-1034 form, along with the standard backup documentation and deliverables in Excel, Word and PDF? Would the SF-1034 accompany/support the SF 1437 for the post-termination settlement costs, or should just the SF1437 be used for that period?

Thank you for your time,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

**From:** Lucas, Matthew <Matthew.Lucas@ed.gov>  
**Sent:** Tuesday, April 8, 2025 1:43 PM  
**To:** Rose Driber <rdriber@fsu.edu>  
**Cc:** Nicole Patton-Terry <npattonterry@fsu.edu>; Gibbs, Joseph <Joseph.Gibbs@ed.gov>; Griffin, Genesis <Genesis.Griffin@ed.gov>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory  
**Importance:** High

Good Afternoon Rose,

Thank you for reaching out. To assist with the settlement process, the Department asks that you submit the following documentation:

1. Standard FORM (SF) 1437 – Termination Settlement Proposal (Cost-Reimbursement)
2. Detailed breakdown of all incurred costs including direct labor, overhead, materials, subcontract costs, and other direct costs.
3. A calculation and justification of the earned portion of the fixed fee. Justification for the portion of the fixed fee claimed should be tied to the percentage of work performed.
4. Subcontractor claims, which is to include supporting documentation and evidence of payment or liability.
5. Any settlement expense claimed, this also should include a detailed breakdown to include labor categories, rates, and all incurred costs.
6. Any necessary documentation to support an audit for example timecards, receipts, and general ledger extracts, etc.)
7. A clear statement of the total settlement amount requested, summarizing all costs and fees outline above.
8. A signed certification that the costs and fees claims are accurate, allowable under the contract and have not been previously reimbursed.

We request that your completed proposal and all supporting documentation be submitted no later than close of business April 10, 2025. Kindly, we request an acknowledgment of receipt.

Thank you,

Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education

Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)

Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Monday, April 7, 2025 4:15 PM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good afternoon Mr. Lucas,

Thank you for confirming receipt last month. I wanted to check in to see if you have any guidance you can share about expectations for the Termination Settlement Proposal. We are proceeding with shut down activities in accordance with the project information request from Mr. Joseph Gibbs.

In addition to this requested information, we've requested SF1437s from our subrecipients and will prepare one for our own post-termination costs. Please let us know if you are aware of any other documentation that should be included with our termination proposal. It's my understanding that some of our subrecipients will have diminished availability due to the impact of this termination.

Kind regards,



Rose Driber, MPA, CRA  
*Associate Director, Pre-Award*  
Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Sent:** Thursday, March 13, 2025 9:47 AM  
**To:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>; Gibbs, Joseph <[Joseph.Gibbs@ed.gov](mailto:Joseph.Gibbs@ed.gov)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good Morning Rose,

I wanted to confirm receipt.

Thank you,  
Matt

Matthew Lucas  
Contracting Officer  
Program Contracts Group (PCG)  
Contracts and Acquisitions Management (CAM)  
Office of Acquisition Management (OAM)  
U.S. Department of Education  
Email Address: [matthew.lucas@ed.gov](mailto:matthew.lucas@ed.gov)  
Phone: 202-987-0839

---

**From:** Rose Driber <[rdriber@fsu.edu](mailto:rdriber@fsu.edu)>  
**Sent:** Wednesday, March 12, 2025 11:52 AM  
**To:** Lucas, Matthew <[Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)>  
**Cc:** Sands, Janelle <[Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov)>; Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

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Good morning Mr. Lucas,

As we continue our shut down activities, I just wanted to check in regarding the submission of the termination settlement proposal. Any guidance you may have would be greatly appreciated. We look forward to receiving the “direction” from the sponsor that is discussed in the governing FAR.

Again, we recognize that we are all facing new challenges. If you are able to confirm receipt, that would be helpful in light of the many staffing changes we have had to navigate at federal agencies recently. It’s been challenging to know where to get what limited information is available.

Kind regards,



Rose Driber, MPA, CRA  
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Florida State University  
(850) 644-8652  
[rdriber@fsu.edu](mailto:rdriber@fsu.edu)

---

**From:** Rose Driber  
**Sent:** Wednesday, March 5, 2025 1:24 PM  
**To:** [Matthew.Lucas@ed.gov](mailto:Matthew.Lucas@ed.gov)  
**Cc:** [Janelle.Sands@ed.gov](mailto:Janelle.Sands@ed.gov); Nicole Patton-Terry <[npattonterry@fsu.edu](mailto:npattonterry@fsu.edu)>  
**Subject:** RE: Termination Notice 91990022C0014 P00009 Regional Education Laboratory

Good afternoon Mr. Lucas,

Again, I hope you are well. While I realize you are probably very busy, I'm following up again in case it is helpful to you, and also in the hopes of reducing FSU's risk of accruing ineligible shut down costs.

Do you know if your office will be working with grantees individually, or disseminating additional guidance in the near future?

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expectations for proposal submission. Please feel free to reach out to me at the number below if you would like to discuss preliminary considerations as we await further guidance.

We appreciate that there are a number of challenges that require your attention and look forward to your engagement as we navigate this transition together.

Kind regards,



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**Sent:** Tuesday, February 18, 2025 10:09 AM  
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